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## Introduction

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### **From bilingualism to intercultural education. From multilingualism to multicultural education**

For the last few decades Europe has become more multilingual. According to Extra and Yagmur (2008), large European cities and their metropolitan areas are nowadays centres for development of multilingualism. People with different religions and cultures, speakers of several languages are more widely met within European countries than they were 30–40 years ago. However, very few speakers become equally fluent in all languages they may know and use. Children learn languages spoken around them from different people, in different conditions and for a range of differing purposes. They do not use the language input from various languages to the same degree and have different pace of language development. Their languages and proficiency develop on different levels, but mainly in the linguistic categories of vocabulary, morphology, semantics, pragmatics and meta-linguistics (Wei, 1998).

In some giant cities, the Centre for Multicultural Education has been established (by the University of London) with the goal of studying the community languages and the bilingualism/multilingualism among their speakers. The Centre in London aims to provide teachers of community languages with training and help (Dalphinis, 1993) and to spur research on bilingual children, speakers of a particular language (Orzechowska, 1984). In some cases, the bilingual/multilingual speakers belong to national minorities or they come from a migrant or refugee family background.

In the case of national minorities, the Council of Europe has developed a Framework Convention for the protection of the rights of national minorities. It states that the *right to education* and *the right in education* for minorities (including literacy in their home language) is guaranteed by several international instruments, such as the UN Convention on the Rights of the Child, the UNESCO Convention against Discrimination in Education, the

European Convention on Human Rights, etc. A Commentary on the Framework Convention for the Protection of National Minorities states: “[it] ensures rights to persons ‘belonging to national minorities.’ It is clear that these ‘persons’ can be men or women, children or adults. Indeed, the provisions of the Convention do not refer to formal school activities, but refer to education and education systems in broader terms” (Advisory Committee, 2006, p. 7).

The largest European (trans)national and ethnic minority are the Roma. In different countries they face differing realities of social and cultural status. In some countries they are recognised as a national minority, and they have a higher status in the society (e.g. Germany). In other countries, such as Bulgaria and Slovakia, they struggle with high and often worsening levels of discrimination. Even in Bulgaria, although the international instruments have been duly signed by the government in Sofia, the Roma do not have the right to study their mother tongue formally. It is prohibited by the government (Kyuchukov, 2020). Roma education remains an attractive topic in the public sphere, often generating rhetoric albeit little hands-on action, and unfortunately, it often becomes a ready focus for obtaining financial support and/or attracting attention to oneself within an NGO or as an academic. Yet, not all that is published or aired in the media is of high quality. Sometimes the publications on Roma are replete with stereotypical descriptions and may offer explanations as to why Roma children “do not like” to study (Kurek et al., 2012). Some articles may describe a problem without more thorough, in-depth analysis, presenting a ‘solution’ superficially (Matras, Legio, and Steed, 2015). Skutnabb-Kangas (2000) sees the problem of Roma children differently. In her opinion, “many present education models for Roma children can be characterized as segregation, either by direct education or as a result of demographic and economic circumstances” (p. 7). The author suggests that all children must study both L1 and L2 as a compulsory subject through grades 1–12. Skutnabb-Kangas thinks it is wrong to force the minority children to study a majority language, their L2, as if it were their L1. She also suggests that all subjects should be taught through the medium of mother tongue during the first 2 years of schooling and the second language should then become a medium of education already in grade 3.

For the successful education of minority children, teachers should have certain specific skills and knowledge. In the view of Mercado and Sapiens (1992), this should include skills and knowledge that aid them in understanding:



- how the classroom settings can be arranged to support a variety of instructional strategies;
- the main principles of second language acquisition and how these can be incorporated into learning activities;
- how the children use their existing knowledge to make sense of what is going on in their classroom.

Bush (1985) draws on “critical education theory”, speaking about the “pedagogy of the oppressed”. In his view, contemporary schools are places where the minority/migrant/refugee children are openly discriminated and humiliated by their classmates, the schools as institutions are ignoring their existence, institutionalised racism has become an accepted tacit “normality”. Only very rarely are the schools interested in perceiving “school life” from the point of view of minority/migrant/refugee children: how they feel in the classroom, what they learn there. Is this a place where they feel happy or rather oppressed and unhappy? Is the school also a school for them, where they can “see” their own culture and voice represented and study their own mother tongue?

The content of this issue of *Edukacja Międzykulturowa* is divided into four sections: articles on multicultural education, the situation of the Roma minority, research reports, and the concluding forum on aspects of intercultural education. There is also a section with book reviews and a chronicle.

In the first part of the journal, the article by Tadeusz Lewowicki explores the history of multicultural education in the Polish society. The paper addresses the situation in Poland after 1918, after 1945 and after 1989. A second article by Nettie Boivin deals with those newly arrived in Poland (refugees, migrants, transmigrants, immigrants), as well as children and intergenerational storytelling.

The second section comprises articles on Roma education by well-known scholars who explore Roma issues and Roma children’s education, such as Ian Hancock, Hristo Kyuchukov, Emine Dinceç, William B. New, Łukasz Kwadrans, and Diyana Dimitrova.

The third section of the journal presents research reports by Anna Szafrańska on mixed marriages, by Anna Odrowąż-Coates and Anna Perkowska-Klejman on the English language as a component of the intercultural Erasmus exchange to and from Poland, by Joanna Sachrczuk on communicative competence of Polish and Israeli secondary school students, and by Jakub Kościółek on joint activities with migrant children.

The last section of the journal contains articles brought together in a forum of intercultural educators. Arleta Suwalska discusses the educational changes in Finland and England in the 20<sup>th</sup> century. Urszula Markowska-Manista discusses a research project on the diverse cultural backgrounds of Polish children. Urszula Namiotko focuses on the theater as an instrument for strengthening intercultural identity, and an article by Krzysztof Łukaszczek and Chen Chen addresses the role of social media in fulfilling the identity needs of citizens in the People's Republic of China.

In sum, the present issue of the journal presents new information and knowledge in the field of interculturalism and intercultural education and illuminates new emergent trends in the field of European multiculturalism and multicultural education.

Hristo Kyuchukov

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# **ARTICLES AND TREATISES**



TADEUSZ LEWOWICKI

## **Multiculturalism/multinationalism and multi- and intercultural education – an essay on a meandering tradition and the uneasy modern times (the case of Poland)**

**Abstract:** The study is a presentation – in an essayistic and exemplary approach – of the meandering history of multiculturalism and multinationalism in Poland. This history until 1918 is described in two dimensions – firstly, a rather peculiar and in fact harmful multiculturalism of rulers' world (mostly foreign election kings and later aggressors) and, secondly, the developing, increasingly richer and introducing important values, multiculturalism of people. This is followed by an outline of the changes after 1918 (mostly the crisis of the multinational state), as well as after 1945 and 1989 – the birth of a national state in two different political systems. The recent years are the times of drifting apart from a pro-European (open to multiculturalism) state in favour of a state and a substantial part of the society which is increasingly less democratic and contests European and global problems. This constitutes the background for the discussed issues of multicultural education. What has been also considered is the (developed in Poland) concept and practice of intercultural education. Intercultural education seems to enhance in the best way the familiarization with and understanding of Others and, in consequence, the shaping of positive relations among people.

**Keywords:** multinational state, national state, multiculturalism, multicultural education, socio-political paradoxes, intercultural education, politics and/or education

\* \* \*

Multiculturalism is a common phenomenon. It is generally associated with national and ethnic diversification and – in compliance with its meaning – with a diversity and multitude of man-made cultures. These diversities constitute a wealth and a chance for the development of societies and individuals. Yet, human history seems to confirm that multiculturalism is a reason

of – and sometimes rather a pretext for – conflicts, wars, tragedies. In spite of its various limitations, aberrations and weaknesses, what brings hope for eliciting the good sides of multiculturalism and preventing bad phenomena is education. Its special field is multicultural and intercultural education. The differentiation between the two in the discipline of pedagogy will be discussed further.

In a book addressed mostly to foreign readers, it seems recommended at least to outline the complicated history of multiculturalism in the Polish territories. What should be discussed against this background are the current ways of understanding and implementing multicultural and (which might even be more important) intercultural education that have come into being in Poland. In an abbreviated approach, some selected – but as I presume – meaningful and characteristic peculiarities of the past and current history of multiculturalism.

## **The meandering history of multiculturalism in the past centuries<sup>1</sup>**

### **The beginning of multiculturalism in the times of the Piast dynasty**

Referring to the knowledge of the past, let the coursebook (also encyclopedic) knowledge be addressed at first. The first more broadly known ruler was Mieszko I (about 960–992). His predecessors, or rather local tribal rulers, were Siemowit (Ziemowit), Lestko (Leszko) and Siemomysł (Ziemomysł). Mieszko I accepted Christianity in 966 and got married to Dobrawa (the daughter of Boleslaus I, the Duke of Bohemia), who was given a Polish name Dąbrówka. Those events – contacts with the Bohemian royal court and the Czech wife, as well as accepting a religion that was quite popular in a big part of Europe – were the first experiences of multiculturalism in the early Polish state. The origins of the state organism are usually associated with Greater Poland, especially with Gniezno and Poznań as the towns in which the lay and church (bishopric) authorities were seated.

According to some other historical views, the organizational beginning of the state can be attributed to the newcomers from Moravia. State structures – to a certain extent following the Moravian experiences – were formed in

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<sup>1</sup> The historical outline is based on coursebooks and studies on the history of Poland, as well as on encyclopaedic sources – all provided in the bibliography.



Lesser Poland, near the border with Bohemia. Among other names, Wiślica and Krakow are mentioned as the seats of the ruling authorities.

Not going into historical debates – as this is the domain of specialists – my intention is to emphasize the distinct traces of multicultural relations of the early rulers. Those were important relationships (e.g. accepting Christianity or joining the European politics and culture) which determined the later history of Poland and Poles.

The process of creating a strong state also involved some less friendly (and tragically marked in the history of humanity) encounters with people and their cultures. The state grew in size and wealth as a result of wars. Mieszko I's son – Boleslaus I the Brave – took Bautzen (Lusatian territories), Olomouc (Moravia) and Nitra (Western Slovakia). That was a period of the consolidation of the state. In 1025 Boleslaus the Brave's coronation took place, which was the culmination of the efforts to recognize the ruler's authority and the status of an independent state.

The following years turned out to be less favourable. The inner conflicts and the ones with the neighbouring countries weakened the state ruled by the Piast dynasty. In the 12<sup>th</sup> and 13<sup>th</sup> century, the state was divided into duchies/districts. The partition was initiated by Boleslaus the Wrymouth, who distributed the districts among his sons. The dominating role was fulfilled by the duke residing in Krakow. In practice, conflicts were inevitable and the state lost its significance. The ruling was hindered by the frequent changes of the dukes in the Krakow district. In 1138–1306, 21 dukes ruled there, including a few Czechs at the turn of the 13<sup>th</sup> and 14<sup>th</sup> century. Only two of them – Premislaus II and Wenceslaus II (one of the aforementioned Czechs) – were crowned and became kings of Poland. A difficult and successful struggle for reuniting the Polish lands was undertaken by Ladislaus the Short (crowned in 1320). However, the territories of the state were shrinking.

This unpromising image of the state should not obscure the changes in more and more multicultural societies. The competition among district dukes, contacts with other countries, trade, attracting artists, construction specialists and advisors from different countries created a favourable climate for familiarization with the people who came to the Polish territories and with their cultures, as well as for benefitting from those cultures.

Some signs of changes distinctly appeared during the rule of Casimir III the Great (1333–1370). It is said that he found the wooden Poland and left it stoned. This was possible owing to, among others, craft masters, construction specialists and artists from other countries. Apart from the newcomers from

the neighbouring monarchies, e.g. Armenian and Jewish communities found their home in various towns. The lasting material proofs of this are e.g. the 14<sup>th</sup> century Armenian cathedral in Lviv (during Casimir the Great's rule and many years in another period, a town within the borders of Poland, to a large extent created and inhabited by Poles) and Kazimierz – a Jewish town in the 14<sup>th</sup> century bordering Krakow (since the 18<sup>th</sup> century, a district of Krakow, with many well-preserved objects of the Jewish culture, functioning as a lively cultural centre). Over the years, such examples were more and more frequent.

The number of foreigners in Poland – Czechs, Germans, Italians, Russians, Armenians, Jews and many others – also increased. They benefited from the favour of rulers, various patrons, estate (town, land, etc.) owners. They enjoyed the rights which they had been granted and tolerance. This is a good and beautiful tradition.

What confirms the shaping of a multicultural environment of scientists and people who wanted knowledge is the establishing in 1364 in Krakow of one of the oldest universities in Europe. Without a doubt, its foundation was enhanced by a large concentration of scientists and students from various regions and countries in this town.

### **The Angevins related to the Piasts and Jagiellonians on the throne and the multicultural population**

In 1370, Casimir the Great dies, which marks the end of the Piasts' rule. The further state rule gains new international – and hence multicultural – dimensions. At first, Poland had a Hungarian king – Louis I the Great, sometimes called, Louis of Hungary (in Poland known as Louis the Hungarian), who became the king of Hungary in 1342 and of Poland in 1370. He came from the House of Anjou and was a son of Charles I (also called Charles Robert) and, what is worth emphasizing, of Elizabeth of Poland (a daughter of Ladislaus the Short). The motives for this choice are not going to be discussed here, but it contributed to the closeness of both states and nations. This was a stage in history which must have had due significance (alongside some later events) in forming the belief in the brotherhood of Poles and Hungarians. In both countries, there is a well-known saying: "Poles and Hungarians are like two brothers – both in fighting and in drinking". Louis the Great's reign was very successful in Hungary and he also made efforts to rule Poles very reasonably.

Louis was succeeded by his daughter Jadwiga. In order to strengthen Poland (especially in the face of outer threats), some allies were sought.

Thus, Jadwiga's marriage to the ruler of Lithuania (Ladislaus Jagiello, Pol. Władysław Jagiełło) was arranged. In 1385, in the Act of Krewa, the Polish throne was taken over by the Great Duke of Lithuania – Ladislaus Jagiello. A personal union united the two countries – Poland and Lithuania (the Great Duchy of Lithuania). As it turned out, this was an efficient defence mostly against the Teutonic Order, which was brought to Poland in 1226 with good intentions to gain an ally by Konrad of Masovia. Against his expectations, Teutonic Knights turned out to be aggressive and possessive enemies.

The fate of the Polish-Lithuanian Union was not easy in many aspects. A major hindrance resulted from different priorities of general politics. The threats for Poland as well as good and bad relations were associated with the western and Northern neighbours. Lithuania – with a much larger territory than Poland (comprising the current areas of Lithuania, Belarus and Ukraine) was engaged in different relations mostly with its eastern and southern neighbours. Ruling the state from two remote centres was not easy. Quite often, the aims of the Polish and Lithuanian rulers were diverse and there was not enough good will and trust. In the long history of the Polish-Lithuanian Union, lasting from the Act of Krewa in 1385 to the partitions of Poland in the second half of the 18<sup>th</sup> century, the conditions of collaboration, rights and duties were often negotiated. Some agreements, called unions, were made – in the aforementioned Krewa, and later in Vilnius and Radom, Horodło, Grodno, Vilnius, Mielnik and Lublin. The Polish-Lithuanian relations after 1572 were negatively influenced by the end of the Jagiellonian dynasty.

The Jagiellonian rule lasted from Ladislaus Jagiello to Sigismund II Augustus. As emphasized earlier, it was a relatively complicated period in ruling the state but, on the other hand, it largely broadened the contacts with people of other cultures, religions and customs. The Polish-Lithuanian Commonwealth, as later the union was sometimes called, was a strongly diversified organism in regard to nationality, ethnicity, religion, language, and culture in general. This cultural diversity resulted from the diversification of the population living in the vast area between the Baltic and the Black Sea, as well as the area from the borders of German states and Bohemia to Moscow and Ryazan duchies and Crimean Khanate (in the 15<sup>th</sup> century), or later in the already reduced territories from the Kingdom of Prussia and Austria to the Russian Empire and Turkey (in the 18<sup>th</sup> century). Over the time, the diversification increased due to the growing numbers of newcomers from other countries.

### **Election (mostly foreign) kings and multinational/multicultural population**

In 1573, an important change was introduced in the political life. During the convocation sejm, it was decided that kings would be chosen by election. That decision brought about a kind of specific multiculturalism in royal elections. The divided electors, in many cases subjected to the influence of foreign royal courts and attracted by material benefits and promises of profitable positions, were unable and/or did not want to choose a good candidate among their own group. Foreign candidates were favoured in hope for various political profits and influences.

The first elected king was Henry III of France (Pol. Henryk Walezy). He was not much interested in the Polish matters, contrary to the events in France. He left Poland already in 1574 (it is said that he did it secretly) and took over the throne of France after his brother. The next elected one was the Prince of Transylvania Stephen Bathory (Pol. Stefan Batory). He was considered to be a good ruler, although the war with Russia for Livonia was going on during his reign. After the Frenchman and Duke of Transylvania, there were three kings from the House of Vasa – Sigismund III Vasa, Ladislaus IV Vasa and John II Casimir Vasa. That was a period of the conflicts and wars with Swedes. The Swedish invasion of Poland during John Casimir's reign caused huge devastation. The king (from the House of Vasa – a Swedish dynasty) conducted a fratricidal war on the Polish side.

After the Vasa kings, Michael I (Michał Korybut Wiśniowiecki) was elected and then John III Sobieski. The latter turned out to be an excellent ruler and leader – he won the battle of Chocim and the defence of Vienna (in 1683). His victorious participation in the battle of Vienna brought about his fame as a defender of Europe against Turks.

After Sobieski, the meandering political history gave Poland kings from the House of Wettin – Saxon elects. Their rule involved electing Stanislaus I Leszczyński twice – the first time, he was supported by the Northern neighbours and, at his second election, by Louis XV, the king of France and Leszczyński's son-in-law (the husband of Leszczyński's daughter Marie). This period was marked with chaos, anarchy, weakness of the state. The situation was worsened by long-lasting wars and the rebellions in Ukraine. Poland was losing territories, the conflicts between the mighty were weakening the state, international significance of a former European power was shrinking.

In regard to the royal elections and kings' reigns, multiculturalism did not result in success. Only few of the foreign rulers wanted and were able to care for the state and its people. Many of them were too much involved in preserving their power, in dealing with the mighty, and in the issues of their home countries.

It should be added that in Europe there have always been examples of taking over thrones by foreign people or dynasties. Yet, it is hard to find such a changeability and number of ruling foreigners as in Poland. The throne was taken over by Czechs, Lithuanians, the King of Hungary, a Frenchman, the Duke of Transylvania, Swedes, and the dynasty of German rulers. Against some hopes of the mighty, various alliances did not strengthen Poland. What grew were the influences of Polish clans (which supported foreign rulers) and of the neighbouring countries (engaged in promoting foreign candidates and then the elected kings).

The history of royal rule outlined above might not provide an encouraging image of multiculturalism as regards electing the people to whom the throne was entrusted. At the same time, this history co-occurs with the phenomenon of growing multiculturalism among the population. There were more and more foreigners – people of different professions, religions, languages. Particularly in big towns, the communities of various nationalities and cultures grew in size – Germans, Ruthenians, Armenians, Jews. Churches, synagogues, Orthodox temples came into being in many places. In Lviv, cathedrals of several denominations were built – the Armenian, Roman-Catholic and Uniate ones. In Zamość, a town founded in the 16<sup>th</sup> century, there have been streets the names of which commemorate different nationalities of its residents. Substantial religious tolerance in Poland enhanced the settlement of foreigners representing other religions. This can be exemplified by the case of the religious immigrants from Bohemia, called the Czech Moravian Brethren, who settled in Poland, mostly in Leszno. Among others, John Amos Comenius stayed in this town in 1628–1655, working as a teacher and the head of the school (gymnasium) there. Many foreign artists (e.g. Germans and Italians) created their works in Poland. For centuries, Jews have substantially contributed to various fields of life.

Thus, multiculturalism had a large and in many aspects positive influence on social life – on trade, art, science, crafts, building and other areas of social activity. In contrast to the experiences associated with foreigners on the Polish throne, the multiculturalism of many social environments, manifested in various spheres of people's life, brought about cognitive benefits, shaped

attitudes, enhanced development of people and their spiritual and material culture. Therefore, this constitutes a platform and a dimension in which special values related to multiculturalism in Poland can be seen.

This special clash between the multiculturalism of political elites and multiculturalism in other spheres of life seems to be a peculiarity which is worth considering in the attempts to understand the later history of Poland and Poles – including the history of multiculturalism and social behaviour in the face of it. Thus, this motif is bound to return in this study.

### **The last election king – a Pole who tried to save the fate of Poland**

The last election king – Stanislaus II Augustus (Pol. Stanisław August Poniatowski), who reigned in 1764–1795, tried to save the fate of Poland. He made efforts to accelerate the development of economy, which lagged behind the economies of West-European countries. He undertook similar efforts in the field of education and culture. The reforms had positive effects. The impact of the Enlightenment ideas turned out to be significant. The foundations for modern (in those times) industry were laid. In 1773, the Commission of National Education was founded – it was considered the first department of education in the world. The Commission prepared and partially implemented educational reforms.

Poniatowski counted on the favourable attitude of Russia. Unfortunately, the effects of previous negligence and the weakness of the state resulted in the I Partition of Poland. In 1772, Russia, Prussia and Austria took over large territories of the state. Then, the struggle went on to strengthen the independence from the neighbours, mostly Russia. In May 1791, a constitution was adopted which aimed at making the state contemporary and at broadening civil rights (by granting them to townspeople). All rescue attempts were too late. An additional hindrance came with the rebellion of magnates, who – supported by Catherine II and the Russian army – abolished the reforms. With the participation of Russia and Prussia, the II Partition of Poland took place and in 1795 – the III Partition, which put an end to the Polish state.

### **Difficult multiculturalism in the time of partitions and the struggle for Polishness and independence**

What came later was a time of different multiculturalism. The Napoleon wars brought back the hope for reconstruction of the state. Many Poles engaged

in these wars and fought on the side of the French emperor. The belief in the rebirth of Poland and their soldier vows led them with Napoleon all over Europe. However, this also involved morally ambiguous events, such as e.g. participation in wars which deprived other nations and states of independence. In 1807, the Duchy of Warsaw came into being – a transitional form of statehood made up of the territories taken by Prussia and Austria. It was associated with the Kingdom of Saxony and was actually subordinated to Napoleon I. Its existence ceased after Napoleon's fall in 1815. By the resolution of the Congress of Vienna, the Kingdom of Poland (often called the Congress Kingdom) was established. It was subordinated to Russia.

What took place in the territories taken by Russia and Prussia was denationalization – russification and germanization were increasing. Various forms of struggle were undertaken in protest. Some uprisings broke out, which triggered repression – mostly in the area under the Russian supervision. The exile to Siberia was a frequent punishment. Many Poles emigrated, mainly to France. In the territories under partitions, the process took place of imposing the dominating culture. Citizen liberties were reduced. After the November Uprising in 1831, the already reduced autonomy was limited even more and after the January Uprising in 1863–1864, all liberties were abolished. Over the time – in 1874 – the Kingdom of Poland was resolved and the rule was granted to the governor appointed by the tsar. The former kingdom was called the Vistula Land.

More favourable conditions for life were in the Austrian-Hungarian Empire. In this multinational and multicultural state, people could have more freedom and tolerance, as well as possibilities of the preservation of their language and culture. People of various nationalities from other parts of the monarchy came in growing numbers to the territories of the Austrian partition. Yet, the assimilation process took place there.

In the long period without Poland as an independent country on the maps of Europe, which lasted for 123 years, strong tendencies to identify with Polishness appeared. Against the pressure of occupiers, the patriotic current in literature and art intensified. Great significance was attributed to the creativity of emigrants whose works reached Homeland. The Polish identity drawing from many cultures started to crystalize in a society that had been multicultural for centuries. In these condition, Frederic Chopin drew inspiration from both French and Polish culture and created music widely associated with Poland. With his multicultural inspirations, one of the greatest prophets – a poet Adam Mickiewicz – wrote his works both in the homeland and

in emigration (Russia, France). Recognized as a remarkable figure of Polish culture, deeply engaged in Polish issues, he is considered by Lithuanians and Belarussians as a representative of their cultures as well. Culture and industry were created by representatives of various nationalities – Poles, Germans, Jews, Russians and many other. There are numerous examples.

However, it should be stated that life in a multicultural society was not free of conflicts. Especially in the 17<sup>th</sup> century, the rebellions of Ukrainians intensified. In the times of partitions, a surge of mass murders aimed at Jews rolled over the territories supervised by the tsar. Emigration grew in force – Poland was left by the poor, work-seeking, as well as talented people heading for success or by the persecuted ones. This pertained to Poles and Jews, but – to a certain extent – also to other nationalities. Over the time, the population inhabiting Belarus and Ukraine developed a stronger feeling of cultural and national separateness, a feeling of their own identity. The signs of differentiation were distinct, on the one hand, there were Polish noblemen, land owners and townspeople, and on the other one – Ukrainian and Belarussian peasantry. Yet, in general, Polish territories were for centuries inhabited by communities of various nationalities and ethnicity, who lived in peace. With large evidence that proves this, it seems that in this aspect Poland was one of the few good examples of a multicultural but at the same time tolerant state – open to Others and other cultures.

All this – the peculiar political history, changing social relations, history of culture – have influenced the meandering history of multiculturalism in Poland – from the state's beginning, through its various ups and downs, to the regaining of independence after 123 years of captivity.

## **Multiculturalism in Poland from regaining independence in 1918 until today**

### **The reconstruction of a multinational and multicultural state**

The hope for regaining independence and rebirth of the state could be fulfilled after the stormy events which took place in Europe in the 1910s. The world war, revolutions in Russia and Germany, the fall of tsar rule, the war lost by Germany and the end of the Austrian-Hungarian monarchy (Poland's occupiers) turned out to be favourable for the restoration of the state. The resolution was to be taken on the peace conference in Paris after the war. The winning Entente countries were interested in limiting the influences of



Germany and Russia and, therefore, they were favourably approached the intention of restoring Poland and indicating its new borders.

This favour was enhanced by over a hundred-years-long struggle of Poles for independence, their participation in numerous uprisings, wars and liberation-aimed activities, undertaken with the intention to bring Poland back to life. What was also important were the relations between the emigration and the societies of the countries which accepted immigrants (mostly France and Great Britain). In the fresh memories of Frenchmen – significant participants of the Paris conference, there was the participation of Polish volunteers from the Bayonne Legion alongside the French Foreign Legion. In 1914–1915, the Bayonne Legion fought in several battles on French territories.

A lot of significance should be attributed to diplomatic and other contacts of well-known Poles with politicians from the countries that won the war. Among the most important contacts are those of an outstanding pianist Ignacy Paderewski (Prime Minister of Poland in 1919–1920, a representative of Poland in the League of Nations), who presented Polish issues e.g. to Thomas Woodrow Wilson, the President of the United States. As it is known, T.W. Wilson largely contributed to the course and accepting the resolutions of the peace conference. He was the author of the Fourteen Points, which determined the conditions of peace. One of them concerned the creation of (independent) Poland.

What should be also mentioned are the activities of various armed formations, at first associated with the occupiers' armies but later (during the war) undertaking liberation actions. The greatest significance was attributed to the Polish Legions and their founder – Józef Piłsudski.

A coincidental occurrence of many events and the activities of Poles resulted in Poland's regaining independence in 1918.

As regards the basic motif of multiculturalism, it ought to be emphasized that the newly created state organism consisted of people from the territories which for a long time had been under the legal system, cultural and social influences, and the impact of different countries and societies. In many aspects, the nationality composition and the cultures were different in each of the occupying empires. This determined the experience of people living in each of them and, to a certain extent, shaped the images and expectations concerning the reborn Polish state. It seems worth adding that some typical (dominating in particular communities) behaviour patterns can be still noticed today among the descendants of the inhabitants living in the areas belonging to different occupiers. Even after a hundred years after regaining independence,

some differences can be seen in the living standards, urbanization, industrialization, railway and road networks in the territories of former partitions. The beginning of the reborn state revealed various issues of broadly understood multiculturalism. In this context, two competitive concepts of state and society were formulated – one focused on the vision of national state, the other – the vision of multinational and multicultural state. These concepts and their presence in modified forms will be discussed in the further part.

The rebirth of the Polish state turned out to be difficult, among other factors, due to the conflicts with the neighbours about the borders. The border with Germany was to be determined on the Paris conference. The discussion seemed to result in the view that the majority of industrialized areas (including coal mines) should be given to Germany. Yet, in the Treaty of Versailles, signed in 1919 on the Paris conference, there was a resolution that the state belonging of Silesia should be decided by a plebiscite.

During the conference, it was considered that those were fundamental resolutions. It is said that President Wilson sent a note to his wife saying: “We reached a peace. Everybody is dissatisfied, thus it might be just. Now, everything in God’s hands”. The President of the USA, who was very favourable to Polish issues, might not predict or might underestimate the effects of leaving some borderland conflicts to be solved by the population living in the conflict areas. As a supporter of people’s self-determination, he applied an over-optimistic attitude. Peace did not come to the Polish borderlands and the dissatisfaction of the countries that wanted those territories appeared in a variety of conflicts. Both Poles and Germans were not going to leave the matters in God’s hands, as Wilson stated. They undertook actions that were aimed at taking over Silesia and its resources and industry.

Still before the Treaty of Versailles, the I Silesian Uprising broke out. This happened after strikes in mines and steelworks and after killing a couple of people who – in the crowd of miners and their families – were waiting for wages in front of mines in Mysłowice. The struggle was undertaken by the forces of the secret Polish Military Organization of Upper Silesia. It lasted from the 17<sup>th</sup> to 24<sup>th</sup> August 1919 and – with the prevailing forces of the German army – ended with a defeat. The insurgents did not have enough weapons. What also failed were the expectations that the soldiers of the so called Haller’s army, who were coming back from France, would join the struggle (Kaczmarek, 2019).

The conflicts in borderlands continued and in August 1920 the II Silesian Uprising broke out. It resulted in Germans’ consent for establishing the Polish-German Plebiscite Police (*ibid.*).

The plebiscite (designed in the Treaty of Versailles) took place on the 20<sup>th</sup> March 1921. 97.5% of people with voting rights participated in it. 59.4% chose the belonging to Germany, 40.3% – to Poland. The result was partially determined by the so called emigrants – people coming from Upper Silesia but without permanent residence there (they constituted 19.3% of all voters). Germans organized the participation of 182 thousand of such people. 10 thousand the so called emigrants voted for joining Poland. Germans gained majority in the towns of The Upper Silesian Industrial Region, Poles – in, mostly agricultural, counties (ibid.).

Such a result of the plebiscite triggered the III Silesian Uprising. In contrast to the previous ones, it is considered as an undeclared Polish-German war into which both countries engaged – Poland and the Weimar Republic.

The effects of the III Uprising turned out to be rather favourable – contrary to what the plebiscite outcomes would suggest: “The Ambassadors Conference of the League of Nations, after long, almost three-months-long negotiations, elaborated a compromise solution and proclaimed it on the 20<sup>th</sup> October 1921. Poland got one third of the territory in which the plebiscite took place, but that was the most urbanized area (inhabited by almost half of the plebiscite voters) and a highly industrialized one (out of 67 coal mines, Poland got 53; it got all iron ore mines, two thirds of zinc and lead ore mines, as well as a large share of metallurgical industry” (ibid., p. 19). Some territories inhabited mostly by people who identified with the reborn Polish state remained outside Poland (Pszczyna and Rybnik counties and a part of Lubliniec county).

Armed conflicts broke out also in the Eastern borderlands. Despite the consent of the Soviet Russia to establish the Polish state, since 1919 some struggle went on which was a harbinger of the war for Lithuanian, Belarusian and Ukrainian territories. A large scale war took place in these territories in 1920. The Polish army conducted an attack, as a result of which Kiev was taken over on the 7<sup>th</sup> of May. The Polish authorities, especially Marshall Józef Piłsudski – the Chief of State, intended to create the conditions for establishing the independent Ukrainian state. It would constitute a precaution – a specific buffer zone – against the dangers coming from Russia. Ukrainians took part in the war (military formations of Ukrainian People’s Republic which fought against the Bolsheviks). Their commander was Symon (Semen) Petliura, who in April signed the Polish-Ukrainian agreement. The plan to establish the independent Ukrainian state failed. Russians conducted a counter-attack and their army almost reached Warsaw. In August 1920, Poles stopped

the Red Army in the Battle of Warsaw, which was later widely known as the “Miracle on the Vistula”. As its result, the Red Army withdrew from the Polish territories. This was also enhanced by the inner affairs in Russia. The Ukrainians from Petliura’s troops were imprisoned in Poland and some of them remained there, enlarging in this way the multicultural society. In 1921, a peace treaty was signed by Poland, Soviet Russia and Ukraine. It kept e.g. the territories of East Galicia and Volhynia within the borders of Poland, which earlier had been accepted by Petliura against his will (Olszański, 2020).

Thus, the Peace Treaty of Riga was a confirmation of the multinational state in which a substantial number of population were citizens of other nationality than Polish.

In the case of Ukrainians, slightly paradoxically, this turned out to be beneficial in various aspects. Tadeusz A. Olszański comments this in the following way: “[...] it turned out that Petliura’s concessions towards Poland were a providential decision: the borderline – indicated in the Warsaw agreement and confirmed in the Peace Treaty of Riga – became the western borderline of the Holodomor (also known as the Terror Famine or Great Famine). Four to five million Ukrainians, citizens of the II Republic of Poland, were not affected by this disaster, nor by collectivization, slaughter of elites and the bolshevization of awareness. For 20 years, they were able to develop in a relatively democratic and law-abiding society. This is why this borderline is also visible today on the political and social map of Ukraine (ibid., p. 59).

Moreover, Spiš and Orava (earlier belonging to Upper Hungary as a part of the Austrian-Hungarian monarchy, mostly inhabited by Slovaks) were comprised within the borders of Poland, as well as a part of Cieszyn Silesia – mostly with the Polish population and (smaller) German and Jewish ones. The lost plebiscite in Warmia and Masuria brought about territorial benefits on a relatively small scale.

It was crucial to gain access to the sea. This meant that, among others, Kashubians and some groups of Warmia inhabitants, with their own cultural traditions and language (the case of Kashubians), found themselves within the Pomeranian voivodeship. Obviously, a Lithuanian community lived in the Vilnius voivodeship and e.g. Masurians in the Białystok voivodeship. In most of the territories of the reborn Poland, there were relatively large Jewish communities – especially in big and small towns.

All this composed a multinational, multiethnic and multicultural state. To a certain degree, mostly in the East, it reconstructed the earlier pre-partitions mosaic of nationalities and cultures. Partially – especially in the South,

this was a new diversity. All these elements were to make up the state organism and the society of this state.

### **A multinational state and society or many nationalities in a state? Poland in 1918–1939**

The multinationalism of Poland in those times is illustrated by the results of the national census in 1921, published in 1925. The overall population was specified as 27 184 836. There were only 6 possibilities of national identification: Polish, Ruthenian, Belarussian, German, Jewish, “other or unknown”. These results are presented in Table 1.

Table 1. Nationality of people comprised in the national census in 1921<sup>2</sup>

Nationality	Number	%
Polish	18 820.163	69.2
Ruthenian	3 899.223	14.3
Belarussian	1 060.041	3.9
German	1 058.824	3.9
Jewish	2 111.304	7.8
Other or unknown	235.281	0.9
Total	27 184.836	100.0

Own elaboration based on: "Rocznik Statystyki Rzeczypospolitej Polskiej [Statistical Yearbook of the Republic of Poland]", 3<sup>rd</sup> Edition – 1924, Warszawa 1925: Główny Urząd Statystyczny.

In various publications and presentations, the information is provided that after 1918 one third of the population of Poland was of other nationality than Polish. The results of the 1921 census contain more precise data. 69.2% of the respondents considered themselves to be Poles. Yet, the quoted numbers are not fully accurate. For instance, the number of Upper Silesia inhabitants of Polish, German and other nationality – respectively: 683 168 (69.7% of the population of Upper Silesia), 289 776 (29.5%) and 7 352 (0.8%) – was provided approximately by accepting the nationality percentages from the 1910 census ("Rocznik Statystyki Rzeczypospolitej Polskiej", 1925). Thus, in spite of their apparent exactness, the provided numbers do not reflect the actual number of people of Polish, German and other nationality in 1921.

Moreover, the numbers pertaining to the Belarussian and Ruthenian nationality are also approximated. There are Ukrainians in the group of Ruthe-

<sup>2</sup> I am thankful to Krzysztof Zeniuk for reaching the sources, collecting and sharing the data from the national censuses of 1921, 1946 and 2011.

nians but it is also quite likely that some Ukrainians were counted as Belarusians. Due attention is drawn to this by some Ukrainian authors (Hawryluk, 1999; Łabowicz, 2013). L. Łabowicz notices that “As the Orthodox inhabitants of these territories (Podlasie region to the North of the Bug River – T.L.) did not have a crystallized Ukrainian national identity, still in the interwar period, they were considered to be Belarussian” (Łabowicz, 2013).

Many nationalities, such as the Lithuanian, Slovak or Armenian one, are missing in the census results. They were treated as “others”.

Particular nationality groups were the largest in the voivodeships (places) of their traditional residence. Ruthenians constituted the largest groups in the south-eastern and eastern territories – the Volhynia, Lviv, Stanyslaviv and Ternopil voivodeships. The largest groups of Belarussians were in the Białystok, Nowogród, Polesie voivodeships and the Vilnius district – in the north-eastern territories. In some voivodeships, the communities of other nationalities than Polish were prevailing as regards the number of residents – e.g. Ruthenians constituted 68.4% of all inhabitants of the Volhynia, 69.8% of the Stanyslaviv, and 50% of the Ternopil voivodeships.

In all the voivodeships – apart from the Poznań and Pomeranian ones (in 13 voivodeships) – and in Warsaw and the Vilnius district, there were large Jewish communities. For example, in Warsaw there were 252 301 Jews (26.9% of all residents), in Warsaw voiv. 163 646 (7.8%), in Łódź voiv. 270 437 (12%), in Kielce voiv. 215 280 (8.5%), in Lublin voiv. 227 902 (10.9%), Białystok voiv. 163 044 (12.5%), Volhynia voiv. 151 744 (10.5%), Polesie voiv. 91 251 (10.4%) (“Rocznik Statystyki Rzeczypospolitej Polskiej”, 1925). These numbers seem worth providing, because most of this population died over twenty years later during World War II.

Residents of German nationality mostly inhabited the Poznań and Pomeranian voivodeships and Upper Silesia. Large groups of them were also in the Łódź and Warsaw voivodeships.

As regards the number of residents in particular voivodeships, different nationality groups dominated. As mentioned before, the territories of former partitions were diversified as regards infrastructure, industry, agriculture and many other issues. This did not enhance the integration and construction of a state organism.

Another hindrance was related to different concepts of the state. The one promoted by J. Piłsudski emphasized the idea of a multinational state, in which people of all nationalities and from all ethnic groups have the same civil rights and participate in the state’s life. This was outlined in the consti-

tution of 1921. Among other things, the agricultural reform was to become a factor that would democratize the society. This reform was determined by the act of 1920 – yet, due to abandoning it, in 1925 another act on the agricultural reform was introduced. However, it was never implemented. Moreover, constitutional civil rights were frequently disobeyed – e.g. in the case of people of other nationalities than Polish (inhabiting eastern territories). This was often manifested in educational issues (which will be discussed later). The concept of an integrated multinational and multicultural society turned out to be hard to implement.

The problems with fulfilling the vision of a multinational state grew bigger because of the supporters of the competitive concept of a national state. The movement of national democracy, led by Roman Dmowski, promoted political solutions aimed at founding a national state. Full civil rights were not obeyed in the case of Belarussian and Ruthenian/Ukrainian population. A hostile attitude to people of Jewish nationality was frequent. Some anti-democratic elements appeared in another constitution of April 1935. The national democracy movement (composed of parties and organizations related to National Democracy) was becoming more and more fascisizing.

The above discussed dualism in approaching the matters of the state and society turned out to be insurmountable. Apart from political issues, the situation in other spheres of life was deteriorating. In 1926, a coup took place, as a result of which Józef Piłsudski got dictatorial rule. The state, which regained independence, did not become a multinational and multicultural organism. It also ceased to be fully democratic.

This course of events is explained by the fact that “[...] National Democracy was a very dangerous group for the state – its vision of a national state, struggling against Jews, Ukrainians, whose voting and other rights were to be reduced. In a similar way, the reduction of workers’ rights was aimed at, as well as imposing one worldview to the whole state. This was extremely dangerous, it could blow up the whole country – because how to judge placing 1/3 of non-Polish citizens in sharp opposition to the state; and the political and economic projects must have trigger a firm reaction of workers, who were not willing to resign from their justly granted rights” (Friszke, 2020, p. 63).

The situation after the coup in May 1926 is aptly reflected in the following opinion: “[...] after May, many bad things happened. Bribery among some opposition activists in order to get them out of their party or buy newspaper headlines. Enforcing personal changes in courts to make them more

submissive. Introducing the censorship of press. These were all activities of an authoritarian, not democratic, rule. Piłsudski created a system in which a pluralistic parliament existed but could neither control the government nor abolish it or form a government different than the one Piłsudski wanted. When he realized the threat from the centre-left wing coalition, he ordered to arrest several oppositional deputies, imprison them in the fortress in Brest for a couple of weeks and put them “through the wringer”. The elections carried out under pressure, among detentions and resolving all rallies (and partially forged in the eastern borderlands) gave the Sanation over 50% of mandates. The deputies freed from Brest were judged and sentenced to several years in prison, e.g. Wincenty Witos (the leader of people’s movement, Prime Minister in 1920–21, 1923 and 1926 – T.L.). Poland became a multi-party state, the parties could organize conventions and demonstrations, release press, but they could not change the ruling authority” (ibid., p. 63).

This lengthy quote is provided here as this opinion of a well-known historian might partially be associated with the situation of contemporary Poland. This is not a model to follow. This description can help to understand better the sources and image of the current socio-political condition in Poland.

The political climate in the interwar period, conflicts between parties, economic problems, and some signs of unwillingness (even hostility) towards people of non-Polish nationality destroyed the vision of a democratic multinational state. The attempts to polonize Belarussians and Ukrainians became increasingly frequent. Polish officers placed in reserve were resettled into eastern territories. The children deprived of minority education were subjected to assimilation (this will be discussed later). In compliance with the intentions of the authorities, polonization – or in fact specific colonization – of eastern regions and their inhabitants was taking place. What returned and grew in intensity was the stereotypical division into “Polish lords” and the local indigenous population of Belarussian and Ukrainian territories. Also the division was consolidated into “Polish towns” and villages mostly inhabited by population of non-Polish nationality.

Another growing phenomenon was stigmatization and signs of hostility towards Jews. This was manifested even in academic environments (cf. e.g. Bukowska-Marczak, 2019) – special places (“bench ghettos” in lecture rooms) were established in universities, the *numerus clausus* principle was introduced, anti-Jewish rallies were organized.

The relations between the central authorities and the Silesian local government and Silesians turned out to be complex and not good enough. There



was no interest in the problems of Silesia, there was no trust, Silesia was treated as a source of profits from its well-developed industry. What became a striking example of bad relations was the imprisonment (in 1930) of Wojciech Korfanty – an outstanding Silesian activist, a Polish plebiscite commissary (in 1021), the commander of the III Silesian Uprising, one of the leaders of Christian Democracy and Vice-Prime Minister in 1923.

These selected facts and phenomena illustrate the failure of an attempt to fulfil the vision of a democratic country that links the population of various nationalities. During the two interwar decades, bringing together people of various nationalities and cultures did not take place. It was even worse – with real force and on a scale not known before (in Poland before partitions), the phenomena of intolerance, national chauvinism, hostility and aggression towards Others appeared.

The relations with the neighbouring countries were not good either. The situation of the multinational (and multicultural – e.g. involving various religions) state was getting worse.

It should be highlighted once more that my focus here is mostly on the issues of multinationalism and multiculturalism. Obviously, I can see and appreciate the efforts of the authorities at that time to create modern industry, infrastructure, to build a port on the Baltic. However, all this was not enough to handle the military and industrial power of Germany or the population potential and natural resources (as a consequence – industrial-armament potential) of Soviet Russia. Building the possible power of the Polish state was much more difficult with a mosaic of various nationalities than in the case of a well-functioning integrated state organism. Creating such an organism was not feasible and/or not wanted.

Still, it should be added that the underdevelopment of the reborn Poland – its industrial condition, general economic potential, military force – was so big that even with a lot of effort made by all groups of the population in Poland and with a very wise policy of those who managed that effort, there were hardly any chances for an efficient defence against the approaching war. Whereas the co-occurrence of certain matters in 1918 was very favourable for the rebirth of Poland, the inner and outer situation in 1939 turned out to be extremely unfavourable for its preservation.

**The war years (1939–1945). Another time without independent Poland. Different fate of the nations of the former multinational state**

September 1939 revealed the weakness of the Polish state. The daring announcements that “we will not give a single button” were not confirmed in reality. One part of Poland was taken over by the German army and after a couple of weeks – in compliance with the Molotov-Ribbentrop Pact – the other (eastern) part was taken by Soviet troops. The occupation years began.

The population in eastern territories (with large numbers of people of Belarussian, Ukrainian and Lithuanian nationality) found themselves in a new situation. For many of them, this brought about the hope for a better fate in a state with culturally related people. For other, this was a threat to almost all liberties and life. The tendencies appeared to gain at least some substitutes of statehood. The hopes and dreams dispersed soon, though some acts of the new authorities, e.g. in educational matters, might seem favourable to Belarussians and Ukrainians.

The occupiers treated elites in the same way. Both Germans and – generally speaking – Russians – made staff purges, started the extermination of scientific environments, intellectuals and freelancers. This painfully affected people of Polish nationality.

From 1941, after the German aggression at the Soviet Russia, all the territories of the former Polish state were under the German occupation. The attitudes of people of non-Polish nationality were various – from collaboration with the occupiers, through willing or unwilling passiveness, to different forms of struggle. Even more complex attitudes appeared after 1943 – some parts of the non-Polish population joined military formations (allied to the occupiers), some engaged in guerrilla movements against Germans, and later some of them – against Russians. On the eastern territories, there were armed battles between Polish guerrillas and the guerrillas from other nationality groups. Unfortunately, civilian population was also harmed. In this combination of conflicts and armed actions, it is hard to find any signs of unity among the citizens of the II Republic of Poland – a republic of many nations.

The time of World War II is a period of heroic struggle with occupiers, efforts to preserve the language, culture, and national identity. This involves such heroic and tragic events as the uprising in the Warsaw ghetto in 1943 or

the Warsaw Uprising in 1944. That time took its toll – about 6 million killed people, mass murder of Jews, genocide committed by the occupiers. That was also the time of ordeal that tested human attitudes.

In July 1944, the first institutions of the again reborn state were established on the territories freed from the German occupation. In 1945, Poland was born again within new borders – without the Lithuanian, Belarussian and Ukrainian territories. The attractive but difficult history of the multinational state (in the traditional form) comes to an end. Belarus, Lithuania and Ukraine became republics of the USSR.

### **Inconvenient (unwanted?) multiculturalism in 1945–1989**

Once again Poland got different borders than before losing independence. Instead of the eastern territories, it gained the areas in the North (with a few hundred kilometres of the access to the Baltic), in the West (as far as the Oder and the Lusatian Neisse), the South-West (Lower Silesia), as well as the territories in Warmia, Masuria, and Upper Silesia.

The change of borders also resulted in the structure of nationalities of Poland's residents. This is illustrated by the results of the national census conducted on the 14<sup>th</sup> February 1946. In the overall presentation of these results, only four categories were considered: Poles, "people during a rehabilitation or verification procedure", Germans, and "others". Moreover, a group was distinguished of people whose nationality was indefinite (Table 2).

Table 2. Nationality of people comprised in the national census in 1946

Nationality	Number	%
Polish	20 520.178	85.7
People during a rehabilitation or verification procedure	417.431	1.7
German	2 288.300	9.6
Other	399.526	1.7
People not taken into account in the division into nationalities	304.322	1.3
Total	23 929.757	100.0

Own elaboration based on: Powszechny Sumaryczny Spis Ludności [National Census of Population], 14 II 1946. Warszawa 1947: Główny Urząd Statystyczny.

The census, conducted several months after the end of the war, allowed to capture the general image of nationalities and drew attention to certain phenomena taking place at that time. What was going on was the repatriation of Germans from Poland to Germany and, at the same time, of Poles –

mostly from the East – to Poland. The action of populating the western territories (called Regained Territories) was taking place. The authors of the report presenting the census results stated that the re-settlement action of the Belarussian, Ukrainian and Lithuanian population was going on as well (cf. Powszechny Sumaryczny Spis Ludności, 14 II 1946, 1947).

The report also comprised the data concerning the leaving of Poland by people of German nationality. According to the official data, in the period from the census (February 1946) to the end of December 1946, 1 615 555 Germans left Poland.

What seemed to be a sign of the times were the people of indefinite identity (e.g. those who did not provide their nationality) or the people during a rehabilitation or verification procedure aimed at clarifying their war history and behaviour. In total, there were over 700 thousand of such people (3% of the all people included in the census).

Over the time, the number of people leaving Poland increased. It is estimated that in 1944–1946 almost 500 thousand Ukrainians were resettled in Ukraine. This took place in compliance with the agreement on mutual repatriation between Poland and the USSR. About 200 thousand Ukrainians remained in Poland. In April, the action called “Wisła [The Vistula]”, which was aimed at them, started – it consisted in displacing the Ukrainian population from these territories and resettling them in various regions of the area earlier inhabited by Germans. The main argument was depriving the Ukrainian Insurgent Army (which undertook armed guerrilla actions still for several years after the war) of their background. The action was aimed at dispersing Ukrainians in various places and at making assimilation easier (cf. e.g. Łabowicz, 2013).

The already mentioned author – a representative of the Ukrainian minority, who completed university studies in the field of Polish and Ukrainian philology, a teacher of Ukrainian, a press and TV journalist – comments the situation at that time in this way: “Substantial dispersion of the Ukrainian population after 1947, poverty, the feeling of temporality, and the anti-Ukrainian policy of the people’s government aimed at justifying the displacement action disseminated a negative image of Ukrainians in the society. All this hindered the rebirth of Ukrainians’ socio-cultural life in Poland (ibid., some references to various Ukrainian sources there as well).

Belarussians were also treated with certain reservations. They were reproached for fraternizing with Soviets in 1929–1941 and for their manifestations of accepting the German occupation in 1941–1944.

Obviously, Germans were treated with even more reservations. The recent tragic experiences enhanced generalizations. Suspicions and accusations concerning all Germans were easily formed. As mentioned earlier, many people of German nationality left Poland in 1946, some others – in later periods.

Generally speaking, with regaining its statehood in 1944/1945, Poland ceased to exist as a multinational state – a country with large numbers of non-Polish citizens. This was compliant with the politics of the ruling authorities, which promoted the slogan of national unity. Paradoxically, internationalism, peace and friendship between nations were also promoted, as well as an image of a state in which “national unity” takes place (this surely referred to the Polish nation). The groups of other nationalities which stayed in Poland would be welcome if they assimilated and did not disturb the image of “national unity”.

The events taking place in the next years confirmed the viability of this state-national ideology. In different circumstances, in the 1950s and later many Poles came back to their Homeland – among other places, from the USSR (dispersed in various republics, they often did not know about repatriation possibilities or they were unable to go through the formal requirements). On a very small scale, this process is still going on.

Simultaneously, the relations with Germany (from the Federal Republic) were changing. In the 1960s, Polish bishops wrote a significant letter to bishops in West Germany with the words of forgiveness and an appeal to forgive the tragedies of the past. In the 1970s, the international relations changed for the better. In compliance with the signed agreement and some benefits for Poland, the consent for emigrating to West Germany was granted to people of German nationality or people able to prove their kinship to Germans. Many people left Poland, sometimes with rather illusory formal foundations but in hope for better living standards.

Also Jews, who survived the war but could not or did not want to survive the anti-Jewish movements (including the events in 1967–1968), were leaving Poland.

Over the time, an apparently more and more open state, establishing numerous contacts and broadening its liberties (which was interrupted by the martial law in 1981–1982), was gradually becoming a national state – ideologically, a state of one nation. This is another paradox – in a short time, a country (and its nation/society), which suffered from the aggression of the supporters of a national state, became a national state itself. It is not the only case in the contemporary history, but in the history of this centuries-long multinational and multicultural state, this seems odd.

In spite of all this, the communities of national minorities and ethnic groups made efforts to maintain their own cultures. Depending on political conditions – the interchanging periods of political “thaws” and “freezes”, various cultural associations, groups and centres came into being or vanished. There were rather façade-like (but also mobilizing) festivals of various cultures and the cultural amateur movement was active. With changing fortune, some of these forms still last. The general European and international legal standards have provided the foundations for the activities that protect national and ethnic cultures of minorities. The question whether the state sufficiently supported this activity can be answered by these communities. Probably, the state had possibilities of better support but sometimes political reasons turned out to be decisive.

**From pro-Europeanness and opening to Others to inner conflicts (the Polish-Polish war), outer conflicts (disputes with the European Union about democracy) and intolerance of Others**

The political transformations initiated in 1989 created a new chance for multiculturalism – this time with the contact with many (mostly) European states and societies. In contrast to other societies, Poles were able to change the ruling authorities amicably and to undertake the effort of a thorough transformation of the state’s political system. Economic reforms and political problems sometimes required painful solutions. Yet, the vast majority of the society could see the aim and sense of the undertaken activities.

What became an important developmental prospect was the integration with the European Union – a strong bond with the states and societies of the West. The efforts to join the EU were hard and required a lot of work and sometimes even sacrifice, including the overcoming of many existential problems. This is frequently forgotten today. The effort payed back and resulted in a success. In 2004, Poland became a member state of the EU.

The new situation opened numerous possibilities of cooperation in almost any field of life. Contacts between people and institutions were established. The state mostly of one nation – the nation that for years experienced various limitations in contacts with the World – opened to Others. Poland became a destination for foreigners, who came here to work, study, rest, etc. Over the time, some possibilities of working and studying in other countries opened to Poles. Poland and Poles became the biggest beneficiary of European funds. Hostile neighbours did not threaten Poland any longer. Germany was an ally.

The improving (since 1960s and 1970s) relations with this country got a new form – the stereotype of a German-enemy, a “bad German”, disappeared. This was an important change. The relations with Ukraine also improved – especially since the Euromaidan events. Poland was becoming a multinational state in a new way – although it remained national in many aspects (e.g. the dominating nationality, culture, religion), it joined the multinationally collaborating European community.

Unfortunately, the political conflict was increasing. Already in the 1990s, the “Solidarity” and post-solidarity environments got more and more conflicted. The arguments were going on about the contribution to the political transformations, methods and evaluations of the ways of acting in the past, the accusations were repeated concerning the peaceful transformation accepted in the “round table” debates. The accusations mostly addressed Lech Wałęsa and later the pro-European current in the new establishment. What became a tragic reason for the division into “two Polands” was the airplane crash in Smoleńsk. The President, the twin-brother of the current leader of the ruling party, died there, as well as 90 other people. There were more and more accusations and libels. The political environment fed itself with conflicts and hatred of many people. This caused serious divisions among citizens.

Both these issues and some other events or motives have contributed to the success of a Eurosceptical party (and ideologically a party supporting a national state) in parliamentary elections. In a new form and in new circumstances, the concept promoted in the interwar period rejuvenated. For several years, the rule has been in the hands of a party which even did not get the majority of votes in the elections but gained the rule owing to the electoral system promoting those who got the biggest number of votes. The reality of the socio-political life in contemporary Poland is well-known in Europe. The fundamental principles of democracy are undermined and the ruling party does not take into account other environments than those which favour the authorities. The situation can be largely described as a façade democracy, earlier quoted in reference to the political system during the dictatorship years in the 2<sup>nd</sup> Republic of Poland. As a state, Poland is often conflicted with the European Union (e.g. in the issues of breaking democratic principles) and sometimes with particular countries. In the international arena, some artificial superpower-like gestures and clumsiness are frequent.

All this creates an unfavourable climate for any Others. There is no will to receive immigrants, no tolerance for people of different worldviews, what appears is racist, homophobic and xenophobic behaviour. This situation can be

summarized by the results of the ILGA-Europe ranking. The author, a journalist of a Catholic weekly, says: “Poland is the homophobic leader of the European Union – it is the last in the ILGA-Europe ranking”. She continues: “The results are based on the analysis of legislation in particular countries and of the practice of using the law in six categories: equality and ban of discrimination; family; freedom of assembly, association and expression; hate crime and hate speech; gender recognition and corporal integrity; right of asylum. The results are provided as percentages: the leader in equality has been Malta (89%) for the fourth time, followed by Belgium and Luxembourg (73%) and then by Denmark and Norway (68%). Poland: 16%. It is even worse than in previous years when we were last but one” (Burda, 2020).

As regards the court system, the Court of Justice of the European Union intervenes, some judges are harassed for their independent conduct, public (media) witch-hunt is going on aimed at people who criticise the authorities’ activity. Nazi manifestations are not rare. What can be also mentioned are the cases of intolerance, chauvinism combined with nationalism, xenophobia, stigmatization, anti-Semitism (Czykwin, 2000; Nikitorowicz, 2012 at al.). Aggression towards the Asian has appeared recently, as they are considered the perpetrators of the current pandemic, as well as towards doctors and other medical staff, who are accused of spreading the virus.

The contemporary socio-political conditions, legal regulations and the economic state enhance migration within the EU and outside it. This contributes to settling down in Poland and in many other states. At the same time, there are communities of various nationalities who have lived in Poland even for ages in some cases. However, the latest national census shows even a stronger domination in size of the people of Polish nationality.

In the 2011 census, there was a choice of two identifications. Regardless of the number and order of the provided declarations, altogether the following identifications were chosen:

Table 3. National-ethnic identification of people comprised in the national census in 2011

National-ethnic identification	Total – regardless of the number and order in declarations (in thousands)
Total	38 511.8
Polish	37 399.7
Total other than Polish	1 467.7
Silesian	846.7
Kashubian	232.5
German	147.8



Ukrainian	51.0
Belarussian	46.8
Roma	17.0
Russian	13.0
American	11.8
English	10.5
Lemko	10.5
Italian	8.6
French	8.0
Lithuanian	7.9
Jewish	7.5
Spanish	4.0
Vietnamese	4.0
Dutch	3.9
Greek	3.6
Armenian	3.6
Czech	3.4
Slovak	3.2
Kocievian	3.1
other	64.4
No identification	0.4
Unrecognized identification	521.5

Source: Narodowy Spis Powszechny Ludności i Mieszkań 2011 [National Population and Housing Census 2011], Warszawa 2015, GUS.

Polish nationality was declared by 96% of the people included in the census. Two biggest communities out of the non-Polish nationalities were the people declaring themselves as Silesians and Kashubians. The majority in both groups (especially Kashubians) simultaneously identify themselves as Poles. Ethnic identifications confirm the revival of these groups' identities, the vitality of their languages and traditions, as well as their focus on emphasizing their ethnic and cultural separateness (sometimes even obtaining some autonomy). These are phenomena that take place in various countries.

Substantially large national minorities are Germans, Ukrainians and Belarussians, although the size of these groups is much smaller than in previous censuses.

Taking into account the results of national censuses, it can be said that Poland is a country in which one nationality distinctly prevails. After 1945, it became an essentially national state. The process of that specific national homogenization – at first resulting from the changes of borders and migration of population – started in the political system defined as socialistic and

intensified in a different one, as a result of different phenomena (such as assimilation and migration), some demographic reasons or the fact of not providing self-identifications.

Comparing the processes taking place in Poland to those in other countries, it can be noticed that, as regards the issues of multinationalism and multiculturalism, the transformations in Poland have rather a weak and superficial relation to the transformations in other countries, e.g. of the so called “old” EU. Whereas the societies in those states are or are becoming multinational and multicultural (Lewowicki, 2012 and other works), for many (both historical and multicultural) reasons, in the country situated on the Vistula, the multinational state (in the earlier form of unequitable nations) ceased to exist over two hundred years ago and a new multinational and multicultural democratic state has not come into being. The reactions to the waving pro- and disintegration trends in Europe seem different as well (Lewowicki, 2013). The phenomena observed in the EU necessitate the search for better integrating solutions, but politicians in Poland seem to be more engaged in criticism but also in the simultaneous use of union funds. Their efforts and participation in solidarity or pro-ecology projects do not appear very convincing.

The dominating social climate, promoted politics and various determinants of life situations affect education, culture, perception of one’s own and others’ identity and many other issues. The above outlined image of experiences concerning multinationalism and multiculturalism has influenced the situation of education.

### **Multicultural education – struggling for identity**

The phenomenon of multiculturalism gained special significance in the 19<sup>th</sup> century. The above discussed surges of independence movements, social and economic changes that trigger emancipatory tendencies, the years of Napoleonic wars, the Spring of Nations, some signs of educational liberalization in the greatest European monarchies (e.g. legal solutions and actions aimed at the popularization of school education) created a situation in which culture (including languages) of different communities – and in consequence the matters of national identity – were becoming important social issues. This was reflected in education. What occurred both in the countries which came into being then (often with a very short history) and in multinational monarchies were the references to history, culture and languages of particular

nations. Sometimes, these references were purposefully avoided or history was presented in a biased way, not reflecting the facts.

In the case of Polish territories under the partitions, the approach of the foreign occupiers to the Polish language and culture was not friendly. In the early 20<sup>th</sup> century, some attempts were made to specify the educational ideology pertaining to minority groups. Paradoxically, in Prussia – the basic tasks of school associated with the education for learners using foreign languages were formulated. They concerned mostly the education of Polish children from the Prussian partition and from the Ruhr area, who had come there with their families as a result of the so called *Ostflucht* – the outflow of labour force from the Eastern territories. In 1901, those tasks were presented by J. Lichte, who later published them in the journal “*Erziehung und Unterricht*” (Lichte, 1901).

As M.S. Szymański, a Polish author, summarizes Lichte’s text, “three main tasks were indicated for school in regard to the presence of foreign language learners. Firstly, to ensure effective implementation of educational goals, the number of learners in a class should be substantially reduced; secondly, as the Polish population makes a lot of trouble to the German authorities, the priority should be granted to education in the German language with special focus on the geography and history of Germany; and thirdly, in the territories inhabited by »a high percentage of the foreign language element«, special efforts should be undertaken so that Polish children could acquire for their whole life »the German spirit, German feeling, thinking and speaking«” (Szymański, 1995).

By fulfilling these tasks, school will become “an important factor in the general activity aimed at maintaining and disseminating the German national spirit” (*ibid.*). The aforementioned tasks unambiguously specify the duty of germanization and should lead to the assimilation of minority groups (Poles in this case).

The assimilation of Polish population was also an educational goal in the Russian partition. The initial, relatively mild rule was followed by the years of merciless russification.

The most liberal conditions in education were in the Austrian/Austrian-Hungarian partition. In this multinational and multicultural monarchy, some forms of national cultures were preserved. Some elements of the language and culture of the nations that composed the state population were allowed also at school. In comparison to the other partitions, this was a more friendly form of assimilation.

However, until World War I, the examples of organized mass school education for national minorities living in the territories of pre-partition Poland can hardly be found. This does not mean there were no efforts to have such education. For instance, in the Austrian partition during the Spring of Nations, “on the 19<sup>th</sup> of April, the Emperor was asked to take care of the Ukrainian population persecuted by Poles, and on the 2<sup>nd</sup> of May 1848, the Supreme Ruthenian Council, headed by Bishop Grzegorz Jachimowicz, was founded in Lviv. Its demands pertained to the improvement of the national existence “in a constitutional way”, the introduction of the Ukrainian language to schools, providing access for Ukrainians to state positions and the same rights for Uniate priests as for Roman-Catholic clergy” (Serczyk, 2009, p. 187).

This demand of the 2.3 million Ukrainian population of Eastern Galicia (Bukovina, Zakarpattia), as well as the agreement established during The Prague Slavic Congress in 1848, turned out to be inefficient in regard to equality of the Ukrainian language (*ibid.*, p. 188).

Belarussian education was an object of interest for the Russian, German and Polish authorities in the early 20<sup>th</sup> century (Siemakowicz, 1997), but what draws attention is the opinion of Jerzy Turonek, an author of many works on Belarussian school education. He says that the beginning of this education in the region of Białystok is associated with the German occupation during World War I (cf. Matus, Charytoniuk-Michiej, 2013; J. Turonek, 2008). It is thought that this was enhanced by the directives of German authorities that education should be conducted in native languages. The implementation was determined by local authorities and communities.

What came into being as a result of this were: the teacher college in Svislach, Belarussian secondary schools (gymnasiums) in Vilnius and Budslau and several hundreds of the so called people’s schools (*ibid.*). The latter existed only for two or three years but they made people aware that the Belarussian language can help in both home contacts and the acquisition of school knowledge (*ibid.*).

Coming back to education and culture in the Ukrainian language, it is worth reminding that in 1867 the autonomy of Galicia was proclaimed, which gave some opportunities for the development of national Ukrainian culture and education. Although the chair of Ukrainian literature was founded at the university in Lviv and the Ruthenian Educational Society, until World War I – a lot of effort was made to develop Ukrainian school education and obtain equal rights for the Ukrainian language. The outcomes were rather poor – at the beginning of the 20<sup>th</sup> century in Eastern Galicia, there were

only 5 gymnasiums with Ukrainian as the teaching language and not a single real school (*Realschule*) or teacher college (Serczyk, 2009, p. 243). During the world war after the Russian aggression, at first schools were closed and then opened and run “in compliance with the Russian models and with Russian as the teaching language. In private schools, the Polish language was allowed in a very narrow scope, whereas Ukrainian was to be totally eliminated from schools” (Serczyk, 2009, p. 246). Alongside some war events and political changes, the rise of Ukrainian gymnasiums was allowed.

### **Educational policy of assimilation – 1918–1939**

After the regaining of independence by Poland, the international standards imposed the duty of elementary education and the possibility to maintain education for minorities in their native language. In 1919, the act on obligatory education for children aged 7–13 (regardless of their nationality and religion) was introduced in Poland.

“Rocznik Statystyki Rzeczypospolitej Polskiej [Statistical Yearbook of the Republic of Poland]” of 1925, which also comprises the results of the 1921 national census, presents the data on school education of various levels in regard to the teaching language or (in the case of higher education) the native language. These statistics show the share of students of different nationalities in education. These are some selected data (concerning the school year 1922/23 or 1923/24):

In Poland in 1922/23, there were 26 653 public primary schools – including 2 272 in towns and 24 381 in rural communes. Most of the schools had Polish as the teaching language – 21 996. Other teaching languages were the following: Ruthenian (in 2 996 schools), German (in 1 102), Polish and German (in 333), Lithuanian (in 53, including 1 school with both Polish and Lithuanian), Czech (in 42, including 3 schools with both Polish and Czech), Polish and Ruthenian (in 39), Belarussian (in 32), Russian (in 9) and Polish and Jewish (in 1 school).

Moreover, in that school year there were private schools. There, the teaching languages were: Polish (in 350 schools), German (in 115), Jewish (in 113), Hebrew (in 71), Lithuanian (in 40), Ruthenian (in 29), Jewish and Hebrew (in 6), Polish and Hebrew (in 3), Russian (in 2), Polish and Jewish (in 2). There were 731 private schools in total.

The largest nationality groups (Polish, Ruthenian, Jewish and German) had the biggest number of schools with their own teaching language – Jewish

communities mostly educated children in private schools. Much worse possibilities were offered to the Belarussian community. It should be mentioned here that the authorities at that time refrained from organizing education with Belarussian as the teaching language in the region of Białystok, justifying this with the fact that at the Versailles conference several counties of the Białystok voivodeship (the counties situated to the West of the Curzon Line) had been included into the Polish ethnic territory (Matus, Charytoniuk-Michiej, 2013).

As regards the number of learners, obviously – the most were educated in Polish (2 642 753 learners), whereas 339 941 were educated in Ruthenian, 83 608 in German, 51 221 in both Polish and German, 6 245 both in Polish and Ruthenian 2 661 in Lithuanian, 1 972 in Czech, 1 884 in Belarussian, 1 450 in Russian, and 339 learners in both Polish and Jewish. The data pertain to state primary schools. The yearbook does not provide information on the number of learners in private schools.

In the school year 1921/22, there were 726 secondary general education schools, in 1922/23 – 762, and in 1923/24 – 764. In 1923/24, the teaching language was: Polish – in 663 schools, Ruthenian – in 20, both Polish and Ruthenian – in 1, Belarussian – in 2, German – in 34, both Polish and German – in 9, Russian – in 10, both Polish and Russian – in 5, both Belarussian and Russian – in 1, Lithuanian – in 1. French – in 2, Jewish – in 6, both Polish and Jewish – in 1, Polish, Russian and Jewish – in 1, Hebrew – in 7, both Polish and Hebrew – in 1 school. Only the schools with Polish, Polish and Ruthenian, German, Polish and German, and Ruthenian were state-run (some were also private or run by local governments). The status of the rest was private.

University students declared the following native languages: Polish – 91.3%, Ruthenian – 1.8%, Belarussian – 0.1%, German – 0.1%, Russian – 0.6%, Bulgarian – 0.2%, Yugoslavian – 0.2%, Romanian – 0.1%, Jewish – 5.1%. There were also several Lithuanians (0.0%) and a group of "others" (including the students of the Trade Academy and the Free Polish University, whose native languages are not provided) – 0.5% ("Rocznik Statystyki Rzeczypospolitej Polskiej", 1925, pp. 219–221, 224 and 239).

In the previous parts of this study, the heading of the Polish authorities for the assimilation of non-Polish population has been mentioned. Its first symptoms can be seen in statistics – refraining from the organization of school education for Belarussians in some areas of the Białystok region, increasing the number of schools educating in Polish (e.g. in the school year 1923/24,

there were 427 such schools more), increasing the number of schools with both Polish and Ruthenian (from 89 to 145) with a simultaneous reduction in the number of schools educating just in one language, for instance Ruthenian, German or Czech. Secondary education did not enhance education of minorities either. Therefore, it is not a surprise that 91% of university students declared Polish as their native language (Poles were 69.2% of the population of Poland at that time). The nationality composition of secondary school and university students was a delayed effect of the earlier history and educational pathways in the reborn Poland.

The violent war years, revolutions in Germany and Russia, later conflicts about post-war borders of states and the ongoing armed conflicts created a turbulent socio-political climate. On the one hand, e.g. the pursuit of Ukrainians and Belarussians of their own states comprising the whole population of these nationalities grew in intensity, but on the other – the actions of Polish authorities (and of other countries as well) radicalized in their soothing the moods, taking control over the situation and including the national minorities to the society.

The state policy on school education for national minorities was largely subordinated to the idea of national state. This education was maintained, but its activity was reduced and many schools were liquidated (mostly for Belarussians and Ukrainians/Ruthenians). For instance, in the first half of the 1930s, several gymnasiums and one college for Belarussian youth were closed (Matus, Charytoniuk-Michiej, 2013; cf. also: Romanowska, 2010; Siemakowicz, 1998, 1999a, 1999b; Turonek, 2008).

In the voivodeships with a large number of Ukrainian inhabitants, there were many assassinations, sabotage actions (e.g. in 1922 – as a protest against the parliamentary elections), manifestations, attacks. Terrorist activities were conducted by Ukrainian nationalists, who demanded the foundation of “self-existing Ukraine” that would comprise also the part of Ukraine within the borders of Poland. This activity was supported, among other things, due to the assimilation policy of the Polish authorities towards people of Ukrainian nationality and due to the effects of the crisis.

The assimilation policy was manifested in the act of 1924 on founding bilingual (Polish-Ukrainian and Polish-Belarussian) schools. Its implementation resulted in a substantial reduction of the number of primary schools with Ukrainian as the teaching language. The scale of this liquidation was severe as in 5 years the number of schools was reduced from 2 151 to 716 (Serczyk, 2009, p. 324). More or less at the same time, terrorism grew in force. For

instance, “Nationalists’ terrorist attacks comprised almost the whole territory of former Eastern Galicia. From July to November 1930, over 2 000 sabotage acts or assassinations aimed at Polish landowners or representatives of the authorities took place. The properties of newcomers were destroyed with particular fierce. Ukrainian peasants took part in this. The main role here was played by the feeling of harm, even more enhanced by irresponsible nationalist politicians” (ibid., p. 326). The response came in the form of pacification actions carried out by the army and police. Several hundred punitive expeditions were conducted and the pacification comprised 16 counties and 450 villages. It can be considered to be another undeclared war. What took place – earlier and later – were armed conflicts, terrorist actions, retributive pacifications, but also the struggle for education. Ukrainians demanded education with Ukrainian as the teaching language, while the Polish educational authorities kept liquidating such schools, claiming that there were not enough qualified teachers, not enough coursebooks and the quality of teaching was poor. At the same time, work in such schools was not aided, there were not teacher colleges preparing for education in Ukrainian, not much effort was made to prepare didactic aids, etc.

The fate of schools for the Slovak national minority turned out to be hard as well. In 1920 (by the decision of the Conference of Ambassadors), 14 residence places where Slovaks had lived for centuries in Spiš and 12 in Orava were included into Poland. There were Slovak schools, functioning within the school system of Austria-Hungary. Despite hungarization (those places were located in the area called Upper Hungary), Slovak teachers worked there. After including those Spiš and Orava places into Poland, Slovak schools were transformed into Polish and most of Slovak teachers gave up their jobs. The authors representing Slovak environments state that Slovak education (education with Slovak as the teaching language) ceased to exist in the Southern borderland of Poland (Majerikova, 2009; Juchniewiczová, 2013). This is confirmed by the lack of information on schools educating in Slovak in “Rocznik Statystyki Rzeczypospolitej Polskiej” of 1925.

According to the same source, in the first half of the 1920s there were primary schools with Czech as the teaching language. In the school year 1922/23, there were 42 such schools (including 3 with both Polish and Czech), which is mentioned earlier. Yet, a year later, there were only 32 such schools and all of them had two teaching languages – Polish and Czech. The school in Zelów (now in the Łódź voivodeship) was not included in the statistics. It started in 1807 as an elementary religious school organized by



Protestants. The changing fate of this school and the community of Zelów have been described in many publications (cf. Pospiszył, 2013; as well as: Pa-puga, Gramsz, 2003; Tobrański, 1994). It is worth mentioning here that in the 1920s Czech denominational schools functioned at parishes/congregations. In one of them Czech was the teaching language. What seems interesting is that the schools educating in Czech, later in Polish and Czech, which were included in the statistics, were located in the Volhynia voivodeship (only one was in the Poznań voivodeship).

In the administrative district of Vilnius, in 1922/23, there were 52 schools with Lithuanian as the teaching language and in 1923/24 – 31 elementary state schools, as well as respectively in the same years – 40 and 34 private schools. Moreover, there was one state school in the Białystok voivodeship, and 1 private secondary school conducted education also in the Lithuanian language.

The above quoted data clearly confirm the limitation of schools in which the only teaching language was the one of a minority community. As it can be read in the statistics, the number of schools with two teaching languages (Polish and the one of a different national group) grew fast from year to year. Over the time, some schools with a non-Polish teaching language (even if it co-occurred with Polish) were closed or transformed into schools educating only in Polish. Education in the languages of minorities was rightly treated as an important factor of shaping and preserving the national identity of non-Polish population. Compliantly with the increasingly dominating ideology of national state, it was considered that such influences should be limited and, therefore, many restrictions were introduced. This was particularly severe in the eastern borderlands. In the struggle for the identity – the assimilation with the Polish majority or the preservation of language and culture (the identification with another national group), the state used school education as a way to accelerate assimilation. With over a hundred years of experiences of russification and germanization during the partitions and in spite of the lasting of the Polish identity, politicians and a part of the Polish society applied such a way of reconstructing the state and society.

### **The war years – 1939–1944/1945**

The situation of school education during World War II was different and changeable in particular regions. In the Eastern territories, at first overtaken by the Soviet Russia, the occupiers' system of education was introduced.

Later – after overtaking that area by Germans – teaching in different languages was allowed but depended on the occupiers' decisions (e.g. municipality commissaries), the standpoint of local communities, the condition of teaching staff, the availability of coursebooks, etc. (cf. Matus, Charytoniuk-Michiej, 2013). Temporarily, Germans allowed educational solutions that enhanced the favour of local inhabitants (e.g. in Ukraine). Slovaks were educated in Slovak schools, after attaching Spiš and Orava to the Slovak state (Juchniewiczová, 2013). Czech children either did not have school education or attended German schools (especially if children's parents had signed the German nationality list) (Pospiszył, 2013). Obviously, Germans used German schools. Jews were deprived of education and largely also of their life. Apart from the form of school education permitted by the occupiers, educational activity of Poles and a part of non-Polish population took place as secret teaching and learning. This is a well-known issue, which goes far beyond multicultural education conducted by the Polish state. Therefore, the motifs of school education in the years of World War II and the occupation of Poland will not be developed there.

### **Policy of national unity – a continuation of assimilation. 1945–1989**

In the reborn Poland, within its new borders, there were much fewer people of non-Polish nationality than in the years of the II Republic of Poland (1918–1939). Although the earlier quoted National Census of 1946 did not reveal this, among Polish citizens, there were still Belarussians, Ukrainians, Germans, Lithuanians, Slovaks, etc. The size of these nationality groups got largely reduced. The smallest changes took place in the case of Slovaks, who lived in Spiš and Orava within Poland until 1939, then during the war in Slovakia, and after the end of the war – in Poland again. Each national minority wanted to have schools educating in their own native language.

The sources referring to school education in the first post-war years usually convey a message suggesting some difficulties in the reconstruction, creation, and later activity, of education for national minorities. These are some examples:

The first two primary schools with Slovak as the teaching language were founded in 1947. Three years later, there were 33. In the 1950s, there was the biggest number of such schools or schools with the additional teaching of this language. Schools educating in Slovak prevailed, yet it changed for the

worse in the late 1960s, when schools with Slovak as an additional language outnumbered them. From 1975, only 2 schools educated in Slovak. Among other things, the reason for such a reduction was the shortage of Slovak-speaking teachers (Juchniewiczová, 2013) and better availability of a network of schools educating in Polish (which is of due significance in the mountainous conditions).

Schools with Belarussian as the teaching or additional language started in 1944. Apart from primary schools, there were 3 secondary schools (1 lower and 1 higher). The early start did not bring success, because: “From the school year 1945/46, the educational authorities started the liquidation of Belarussian education, justifying this with Belarussians’ leaving Poland, the softening of national antagonisms, and a low quality of teaching in those schools (unqualified staff, lack of didactic materials). The activity of county education inspectorates led to almost complete elimination of Belarussian education in the school year 1947/48” (Turonek, 2008; Matus, Charytoniuk-Michiej, 2013, p. 40). The next political decision enabled education in Belarussian or its introduction as a school subject from 1949 (*ibid.*).

The political events in the 1950s resulted in a decrease in the number of schools with the Belarussian language (*cf.* Mironowicz, 1994; quoted in: Matus, Charytoniuk-Michiej, 2013). Over the time, Belarussian was treated as an optional subject. In the 1970s, the educational reform – the liquidation of small rural schools – contributed to another reduction in the number of schools with Belarussian as the teaching or optional language. The number of students learning this language substantially decreased. In 1955–1970, there were about 10–11 thousand such learners, in the 1970s and 1980s – about 3.9–4.5 thousand (Turonek, 2008, p. 767; Romanowska, 2010, pp. 99–101; quoted in: Matus, Charytoniuk-Michiej, 2013, p. 43). School education with the Belarussian language comprised increasingly fewer learners.

The fate of school education with Ukrainian as the teaching language was even harder. Dispersed after the “Wisła [Vistula]” action, Ukrainians usually inhabited small villages, in which they constituted a distinct minority (less than 10% on average). They were deprived of possibility to learn Ukrainian. The so called points of teaching the Ukrainian language came into being only in 1952. They were cross-school and cross-class teams of children at various age. In 1956, there were 140 such points. Primary and secondary schools with the Ukrainian language were organized as well (Łabowicz, 2013). “The best period in the development of Ukrainian school education was the late 1950s and the 1960s. In 1963/64, 3 283 learners were taught Ukrainian in 7 schools

and 137 points, which was the most in the whole history of teaching Ukrainian in the Polish People's Republic" (Łabowicz, 2013, p. 79).

In the 1970s, a regress in the education of Ukrainian took place. This breakdown was caused, among other reasons, by the reform of the school system and the already mentioned liquidation of small rural schools and teachers colleges (preparing teachers for schools with Ukrainian), as well as by anti-Ukrainian propaganda (resulting in hiding the national identity). The number of learners considerably decreased in the 1970s and 1980s (*ibid.*, pp. 79–80). The smallest number of learners and teaching points was in the school year 1981/82. In 1988/89, during the political breakthrough, there were 4 schools and 57 points of teaching, which altogether comprised 1 410 learners (cf. the table in: Syrnyk, 2006; presented in: Łabowicz, 2013, p. 80).

The situation of the German national minority was particularly unfavourable. Bernard Gaida, the author of a study on teaching German as a national minority language in Poland, the head of the Association of German Socio-cultural Societies, reminded his readers in his text of 2013 of the total ban on "teaching the German language in Upper Silesia and Warmia and Masuria throughout the whole time of the Polish People's Republic" (Gaida, 2013).

The first post-war years were not a favourable time for school education with the Lithuanian language. Schools in Puńsk and Sejny were opened only in 1952. In the following years, the number of schools with Lithuanian as the teaching language grew to 9, and in 15 schools this language was treated as additional. Those schools had serious difficulties, including the lack of teachers who knew Lithuanian and coursebooks in this language (Wojciechowski, 2013). In 1956, a secondary general education school was founded in Puńsk. Soon, it distinguished itself by a high quality of teaching and educational successes. Despite a lot of effort, at that time founding such a school in Sejny – a traditional centre of activity of the Lithuanian community – was not possible (*ibid.*).

The history of school education for national minorities in 1944–1989 – although taking place in different political conditions, in different relations with neighbouring countries, in different times – to a certain extent seem to be a continuation, another stage, of the social processes in the II Republic of Poland. Paradoxically, what has turned out to dominate in various political systems and constellations is the ideology of national state. This has happened in a country in which many citizens appeal to the tradition of a multi-national, multicultural, tolerant country that is friendly to Others. This image of the past was often embellished and considered true by some and false by

others. There were reasons for cherishing this positive impression and referring to it. However, it turned out that what dominated – at first after many years of partitions and then wars – was the model of the state which was not much friendly to Others who were also its citizens.

The past conflicts (also armed ones), various experiences of war years, politics and propaganda shaped a distrustful and unwilling attitude to national minorities. Without a doubt, people's behaviour and interpersonal relations have always been varied – friendly, indifferent, hostile. In the case of the educational policy, they turned out to be unwilling towards minorities, aiming at their assimilation, limiting the possibilities of cherishing their language and culture. To a certain extent, this educational policy was successful – schools for minorities were closed and new ones were not organized, the number decreased of children who learned their native language, history and culture. Some really submitted themselves to assimilation. It is hard to accept that – in the society with a long tradition of struggle for preserving the Polish identity – the attitudes enhancing the loss of identity by the co-citizens of a different nationality are right and bring a success worth recognition.

### **After 1989 – multicultural or/and intercultural education**

The widely consolidated model of multicultural education assumes that national minorities have schools dedicated to them and focus on learning the language, history and culture of their own nation or ethnic group. The history of multicultural education in this sense has been a continuous struggle between minority and majority communities. Equipped with proper instruments of rule, the majority usually has an advantage and tries to make use of it. The above presented examples seem to confirm this.

A lot of effort is undertaken not to allow uneven fights. Widely known international legal regulations indicate standards in the issues of education and culture of national and ethnic minorities. In practice, even ratified agreements are often not obeyed or the conditions are created which hinder the use of rights granted to minorities.

The political transformations, initiated in Poland in 1989, brought hopes for beneficial changes. Partially, they were fulfilled. For instance, children of Lithuanian nationality got the possibility to learn in their language in the classes with Lithuanian as the teaching language in two schools in Sejny and later the School Complex with Lithuanian Teaching Language came into being. Yet, problems started soon – the educational reform posed a threat

of liquidation, several schools were later really closed. As a result, 50% of schools with Lithuanian as the teaching language or with the possibility to learn it were liquidated (Wojciechowski, 2013, pp. 25–28). Owing to the efforts of the Lithuanian community and substantial support of the Lithuanian government, the school in Sejny came into being. The access to coursebooks in Lithuanian improved as well (*ibid.*, pp. 29–33). Currently, there are several schools with Lithuanian as the teaching language or with the possibility to learn it in cross-class teams. The schools are largely supported by the Lithuanian government.

A certain progress has been made as regards education in Belarussian. A kindergarten was founded with classes in the Belarussian language and on Belarussian culture, this language is taught as a subject in over 20 schools. The lasting of Belarussian education and culture largely results from the social activities of people of this nationality.

Ukrainian school education is in a similar situation. After the political transformation there were from 4 to 8 (in the school year 1995/96) schools with Ukrainian as the teaching language and 5 in the following years (Syrnyk, 2006; quoted in; Łabowicz, 2013). That number has maintained for many years. Moreover, there are over 100 teaching points. Later statistics are not reliable as regards education, because they provide one number for both schools and teaching points. What still dominates are cross-class, cross-group and cross-school teaching points. The schools and teaching points are scattered, which results from the dispersion of Ukrainian population after the (earlier mentioned) post-war “Wisła [Vistula]” action. Education in teaching points is often ineffective – hindered by small lesson assignment for this education, the need to commute to the points, the lack of curricula and proper coursebooks, lack of methodological support for teachers (*cf.* Łabowicz, 2013). What seems helpful are the contacts with schools in Ukraine. It seems the quoted author is right in her opinion that: “[...] the future of Ukrainian education in Poland will largely depend on the condition of the Ukrainian community. Without a doubt, this will be influenced by: the support of the Polish state, breaking the negative stereotype of a Ukrainian, dissemination of the knowledge concerning the Ukrainian minority, and especially by running educational activities at school, as well as building the attitudes of openness and tolerance, etc.” (*ibid.*, p. 102).

The German minority has the biggest number of schools and points educating in German. After the period of bans, it was possible to maintain the German language and familiarize with history, geography and various fields

of culture in the course of school education. In 1992–1998, the advancement of education with the German language was particularly distinct. In the mid-2010s, there were about 500 schools in which learning German was possible, though the form of additional lessons prevailed. The German community suggested introducing education in German or in the bilingual system (which would maintain both the German identity and Polish citizenship).

Keeping in mind that the legally recognized national minorities in Poland are: the Belarussian, Czech, Lithuanian, German, Armenian, Russian, Slovak, Ukrainian and Jewish minority, it should be noticed that, apart from the aforementioned schools and teaching points for Belarussians, Lithuanians, Germans and Ukrainians (four largest minorities in Poland), there are also few educational centres for the Slovak, Jewish and Armenian minority.

Among ethnic minorities (the Karaim, Lemko, Roma and Tatar ones), only Lemkos have the possibility of learning their language in schools and teaching points. According to the statistical data, the other groups have no similar possibilities or they use non-typical educational forms or are taught in their own environments.

What seems worth highlighting is the rebirth of the regional language and culture of Kashubians (Kossak-Główczewski, Kożyczkowska, 2013; Kożyczkowska 2019). The Kashubian community has over 400 centres (primary and secondary schools, teaching points) in which the Kashubian language and culture is taught and familiarized with. It should be added here that this community, comprising about 232.5 thousand people – mostly identify with Polish nationality (about 215 thousand people), the Kashubian identification is declared as the second (cf. *Narodowy Spis Ludności i Mieszkań*, 2015; data concerning 2011. There were two possible identifications).

Another phenomenon worth attention is a relatively numerous identification with the Silesian region – its language and culture. In the 2011 national census, such identification was declared by about 846.7 thousand people, including 430.8 thousand who simultaneously chose the Polish identification. So far, this has not been reflected in the system of school education.

The general image of school education for people of non-Polish nationality does not seem impressive. The possibility of teaching-learning the language and familiarizing with the history and culture of minorities in schools are limited for various reasons. Firstly, they mainly pertain to four national minorities, one ethnic group and one regional language and culture. Secondly, the dominating form is education in teaching points – with small number of teaching hours, in a narrow thematic scope and often in difficult condi-

tions. The state of this part of the educational system largely depends on the minority communities and, what can be easily seen, on the support of their homeland.

Generally, what is not considered in school education for national or ethnic minorities and for groups distinguished by their regional language and culture are the possibilities to learn the language and culture in schools and other centres which are available outside the Polish system of education – e.g. in schools at embassies of foreign states. Some educational possibilities are not presented in the statistics in a detailed way. It can be mentioned here that in the 2011 national census, there was only a choice of 23 national identifications, but there were also the categories: “other” (chosen by 64.4 thousand people), “without national belonging” (0.4 thousand) and “indefinite” (chosen by about 521.5 thousand people). Some learners in all these groups attend Polish schools, however – some (both from national minorities and communities without the legal status of a national, ethnic or regional minority) are educated in other schools.

What seems necessary while discussing multicultural education is a critical view on the specific paradigm of this education. The care for the possibility to learn in the native language, to familiarize with the history and culture of the community with which one identifies, to preserve important elements of one’s identity is well-understood. The education that should serve this aim has been formed in the opposition to the education of dominating groups, oriented towards the assimilation of minority groups (communities) – or rather the dominated groups (frequently larger than the majority group). Communities (sometimes whole societies) have demanded such school education that functions within a particular system of education but, in fact, outside the school education of the dominating community. It has been known for a long time that, apart from the benefits concerning the cherishing of the group and individual identity, this can bring about some phenomena and effects which cannot be regarded as beneficial. These are, for instance: self-stigmatization which enhances stigmatization by the majority group (Czykwin, 2000), xenophobic attitudes, the feeling of alienation in the state of which one is a citizen, consolidation of stereotypes. All this might have turned out to be a necessary price in the condition of particular struggle for identity.

Today, the questions are justified whether the struggle for identity must really go on (or even whether it is going on), whether the comprehension of an identity is still restricted to e.g. one nation or one religion (denomination)



and whether the preparation for life in the society of a particular country takes place best in, with certain exaggeration, educational isolation – an educational island. The doubts concerning such an approach are noticed, among others, by the earlier quoted authors exploring school education for national minorities in Poland. They feel the need of breaking with stereotypes, of a mutual exchange of the knowledge concerning Others, of dialogue, of fulfilling one's own educational aspirations, but also – as B. Gaida writes – of “shaping the European idea of unity in diversity” (Gaida, 2013, p. 155). It should be added: and following this idea in educational practice.

The traditional, perpetuated for over a hundred years, image of multicultural education has had supporters and implementers in educational practice. Yet, the changing (changed by people) conditions of life and multiculturalism treated in many places of the world – also in Europe and in the EU – as a widely accepted natural phenomenon, as a kind of wealth providing developmental chances, gives new importance to undertaking the dialogue with Others, to applying the attitudes of openness to Others and their cultures, to learning their world (which in many aspects might be a shared world). This becomes more important than isolation, rejection of Others and the pseudo-patriotic closing oneself in the somehow defined “own groups”.

What enhances the new approach is not so much multicultural education (led “next to” Others, in certain isolation and very often in artificial opposition, with the use of stereotypes and bad memories of the past) but intercultural education.

Intercultural education promoted in Poland is based on numerous foreign experiences which have been aimed at mutual familiarization of people of various cultures, at dialogue, at getting acquainted with the history and cultural wealth of Others (an overview of various educational concepts and practices, among other studies, in: Lewowicki, Ogrodzka-Mazur, Szczurek-Boruta, eds, 2000). Practical activities have been inspired e.g. by the Theory of Identity Behaviours (cf. Lewowicki, 1995a, 1995b), the concept of creating a child's identity (Nikitorowicz, 2005), the concept of multidimensional identity (cf. Nikitorowicz, 2001; 2003; many works by Lewowicki – also quoted at the end of this study).

Crucial inspiration has been provided in the works of Mikhail Bakhtin, showing the borderlands of cultures. This substantially broadens the understanding of multiculturalism as a multitude of national or ethnic cultures to a multitude of cultures of people of the same nationality, believers of the same religion, followers of the same ideology, inhabitants of the same home,

etc. (Witkowski, 2000). Such an approach leads to recognizing the multitude of cultures in various fields of life and liberates from the limitation to the most often noticed national cultures or religions/denominations. In this sense, borderlands of cultures have a universal dimension – they might concern differences between all people and the worlds of their cultures. This obviously comprises national, religious, cultural, regional, micro-environmental, educational and other differences. In the conditions of contemporary Poland (with the society of which 96–97% declare Polish identity and with the dominating policy of a national state), such a sense given to diversity and borderlands of cultures was a radical turn in the understanding of multiculturalism – traditionally associated with nationality and religion/denomination. Multiculturalism has as if regained its fundamental sense – of a multitude of cultures.

An important change came with recognizing that an identity did not have to be attributed (because of the place and social environment of birth), somehow inherited. With growing frequency, identity is chosen by an individual, changes in self-identification are made. This particularly pertains to cultural identity.

Finally, what takes place in the perception of multiculturalism and identity is the realizing and acceptance of the fact that an identity is shaped in various environments and cultures. Thus, it becomes a multidimensional identity, drawing from such environments (and their cultures) as family, local environment, region, educational institutions and environments, religious/denominational institutions, nation (and in broader terms – society), state, and more and more often the region of the world or the globe in general. What is observed is drifting apart from simplified identifications only with a nation, state or religion/denomination. Obviously, this process of self-identification and identification of other people is still going on and has a lot of significance for people. However, what appears in deeper reflections are much more complex identifications. This was reflected, for instance, in the national and ethnic declarations in the above quoted 2011 national census in Poland.

The discussed issues are manifested in educational practice. Many undertakings in schools and cultural-educational institutions are initiated owing to suggestions from academic environments. It was here – in universities and other institutions of higher education – where the departments and chairs (or other units) dealing with intercultural education were established. Broader interest in this education can be associated with the foundation of the Social Team for Research into Borderland Education and Culture in 1994. Joint

studies and publications contributed to the birth of research teams in various universities. Over the time, a team was established at the Committee of Pedagogical Sciences of the Polish Academy of Sciences and – later – the Association for Supporting Intercultural Education. The years 1994–2015 turned out to be the “golden age” in the development of intercultural pedagogy as a scientific subdiscipline in Poland. Staff and organizational development took place and many studies were undertaken. Research activity co-occurred with educational initiatives. In schools and cultural-educational institutions, many classes were introduced which enabled the meetings and closer familiarization with – generally speaking – Others and their cultures. The stereotypes and barriers caused by mutual non-acquaintance were broken.

The favourable conditions were created owing to the pro-European policy of the government (consecutive governing staffs) and the efforts to join the European Union. This took place in 2004 and brought about the opening to the EU states, as well as benefits in many spheres of life. Intercultural education became an important field of social practice, helpful in the integration with the union states and societies. To a certain extent, this also brought state school education (for Poles) closer to school education for national minorities. What is more, a lot of interest in many communities (and their cultures) appeared, which so far had remained beyond the official current of education for minorities.

The time of efforts to join the Union and the first years of rightful membership brought about positive experiences in education – intercultural contacts revived, better acquaintance with Others and mutual enriching of cultures became possible. What could be noticed was the youth’s aiming at familiarization with foreign cultures (along with their languages) and the conditions of life in the union part of Europe. New perspectives opened, there were expectations in many environments that school would better prepare the young for their future life. Similar expectations were expressed by learners from Polish environments abroad, who were educated in foreign schools with Polish as the teaching language (cf. e.g. Ogrodzka-Mazur, Klajmon-Lech, Różańska, different parts of the world (also some European countries) does not foretell good changes. Therefore, there is even bigger need for efforts to maintain and develop intercultural education, which enhances familiarization with and understanding of Others and their cultures, as well as friendly cooperation and peace. This message encourages or even obligates to collaboration with institutions and people who head for international cooperation, obeying international legal norms, and better living standards. As

it is believed, education conveys mainly noble messages but it is also known that its causative force is limited. This necessitates the search for allies with whom it is possible to achieve more for a good cause. Paraphrasing the words of John Paul II, it can be said that education in its positive programme serves good use as it helps to elicit from people the best sides of humanity.

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NETTIE BOIVIN

## **Transmigrant and immigrant preschool visual response to intergenerational multimodal storytelling**

**Abstract:** Newly arrived (refugees, migrants, transmigrants, immigrants) children require a shift in intergenerational storytelling. Intergenerational storytelling enables culturally and linguistically diverse emergent learners exposure to not only language but socio-cultural knowledge, values and practices. This study examines the intergenerational storytelling and art session held at a co-joined pre-school and elderly care home. There were 15 pre-school children aged 4–6, half of whom were newly arrived in Finland, and 4 Finnish elder storytellers. The theme of the project was to utilize everyday socio-cultural practices. The study used Pink's visual semiotic and Kress' multimodality for analysis. The research investigated two questions: 1) *To what extent can intergenerational multimodal storytelling benefit transmigrant, immigrant community engagement and identity?* 2) *In a globalized world, how do children's relationships with multimodalities create learning (language, socio-cultural practices)?* Data was collected from qualitative pre – and post-session discussions from the six storytelling sessions, video recordings made by the participants, and multimodal artwork created by the children after each storytelling session. The results revealed transmigrant children engaged with components of stories that connected to their residency situation. Additionally, children represented themselves in the art as response to multimodal storytelling sessions. Interactive storytelling was effective means for socio-cultural interaction between pre-school children and elderly storytellers/people.

**Keywords:** intergenerational storytelling, arts-based literacy, visual discourse, transmigrant

### **Introduction**

Transmigrant pre-school children (4–6) face challenges in their life experience as they adjust and integrate into their new school and community (Clinton, 2015). The challenges they face are not just learning a new language.

There are intersecting social, psychological barriers that interfere in emergent language and literacy practices such as a lack of socialization coupled with a lack of understanding of everyday socio-cultural practices of the new country of residency (Rucpic, 2018). For later academic success in learning, emergent learners (under seven years of age) need increased exposure to context-embedded vocabulary to better facilitate knowledge comprehension (Heath, 1983). As prior research indicates, storytelling practices provides an increase in exposure to vocabulary situated in daily socio-cultural context and practices (Luo, and Tamis-LeMonda, 2017). This is the rationale for the project choosing to implement an intergenerational, multimodal storytelling program for mixed background pre-school children (transmigrant, immigrant, and local Finnish). The informal learning program was based on everyday topics such as childhood, clothing, arts and crafts, sports, games, and food rather than from storybooks (Flewitt, 2013) All of the oral stories covered everyday cultural knowledge specific to Finland, thus, increasing emergent language learners' social context-bound vocabulary knowledge (Dyson, 2016).

The paper highlights a program instituted in an informal learning environment designed to create engagement and build bridges between elder storytellers and pre-school immigrant/transmigrant and local children. The caring practices, to ensure community building was weekly multimodal intergenerational storytelling sessions, followed by the children art-based creative reflections of responding to the storytelling content. Intergenerational storytelling has occurred since the beginning of time (Heydon, 2012). Research reveals that intergenerational multimodal storytelling highlights children's connections to past practices, memories and symbols as story represents memories and cultural identity (Wessel-Powell, Kargin and Wohlwend, 2016). However, few studies have examined multimodal oral storytelling and children's visual art creations as reciprocal responses investigating children's knowledge learnt from these multimodal storytelling interactions. A final objective of the program process was to strengthen the relationship between generations while providing a space for immigrant, transmigrant, and local children to have a voice. This occurred through arts-based creation by the children to the multimodal storytelling.

Therefore, the aim of the project is two-fold. The first is to provide opportunities for the Finnish elder and transmigrant, immigrant, and local children to experience the similarities in cultural heritage practices (food, culture) that multimodal storytelling can teach them. The second aim was to investigate

how these children learn, intersecting knowledge of everyday, cultural, and historical language and practices through art-based communications. Additionally, to investigate to what degree does this allow them to reconceptualise and own the knowledge transmitted from the intergenerational oral stories. The study investigated: *To what extent can intergenerational multimodal storytelling benefit transmigrant, immigrant community engagement and identity? In a globalized world, how children's relationships with multimodalities create learning (language, socio-cultural practices)?*

### **Culturally and linguistically diverse learners**

Young culturally and linguistically diverse (CLD) learners and their families (transmigrant and immigrant) may encounter challenges while settling into their new educational environment. Emergent learners whose home culture differs from mainstream culture (Clinton, 2015). These learners come from a wide range of backgrounds. Therefore, it is not just the language, but emergent culturally diverse learners need socio-culturally embedded practices intersecting with language. Emergent language development should include the opportunity to hear the basic sounds of language, relate these sounds to meanings, and respond verbally (Clinton, 2015). Using voice, gestures and multimodality enables transmigrant and L2 learners to overcome learning gaps (Kress and Jewitt, 2003). This includes expanding vocabulary through multimodal (objects, artefacts photos) to raise comprehension. Providing ample generous opportunities for exposure to oral language throughout the day (one-to-one, pairs, small groups, large groups). Developmental differences exist between learners regardless of their cultural origin. A wide variety and multimodality of language experiences embedded in intergenerational storytelling have a significant impact on the learner's ability to make sense of new learning regardless of cultural origin (Patino-Santos and Relaño Pastor, 2018). As the research indicates emergent learners (immigrant, migrant and local) requires various means of language co-production such as paralinguistic, socio-cultural, interactional, and most importantly multimodal (Dyson, 2016).

### **Multimodality**

This project expands from Narey (2009) previous research, which examined how children develop multimodal narratives through the construction of

quilt squares to represent who they were and what was important in their world. The present study investigated the alternative ways children communicate and learn everyday social integration practices through visual arts-based responses to multimodal intergenerational storytelling (Rupcic, 2018). Narey (2009) advocated for using the arts as a process that develops and extends language, literacy, and meaning-making. Viewing the arts as a visual language and literacy offer another lens on viewing young children's meaning-making and on how they make their graphic thought visible through visual narratives" (p340).

Revealing their identity texts (Cummins, 2004) through multimodal engagement reflects the significance of being able to understand, communicate, and think in alternative ways and illuminates how children navigate the relational landscape of their visual literacy narratives (p341)". Also contributing to this developing socio-cultural learning were weekly opportunities to tell elder stories, respond to these stories, and listen to each other. Understanding the socio-cultural significance of children's experiences enriches the dimension of learning interactions (Luo and Tamis-LeMonda, 2017). Honouring personal histories through intergenerational visual discourse provides the possibilities of co-creating an environment that values the building of community.

### **Visual representations**

Storytelling is a critical social mechanism for the intergenerational transmission of cultural values, knowledge, and practices (Brown, 2013). Storytelling is not just the linguistic and text components but with this generation encompasses a wider array of modalities (art, sounds, objects, and interaction). The visual discourse of children and their families not only provides a socially constructed lens of understanding but also enables reflection and potential for transforming learning practices" (Cummins, 2004 p341). Understanding that visual representation is presented in the art and additionally that reconceptualizes what the children believe to be relevant from the story is important for multicultural globalized identities. This expands not only children's ability to communicate and represent learning and identity. Their artwork becomes visual discourse representing their response to multimodal storytelling (Porte, 2000; Wessel-Powell, Kargin and Wohlwend, 2016). The children communicated, through multimodal visual discourse, their reinterpretation of what the story meant to them. Therefore, children can find their

voice by visualizing what was significant to them. This manifested in self-confidence to represent ideas pictorially and to express verbally.

## Methods

This article stems from a larger two-year study called Building Bridges (2018–2020) involving newly arrived and settled groups (preschoolers, children, young people, community workers, and elders). The research was conducted at a twinned preschool and aged care home. We recruited elder volunteers from those who either lived in the care home or lived by themselves nearby: one man and three women in their late 60s to mid-70s. Additionally, there were 15 multicultural preschool children (ages 4 to 6 years old) participants. The children, whom all came from the adjoining preschool, formed two groups: eight children aged 5–6, and seven children aged 4–5. All participants both elder and children were pseudonymized. All participants (teachers, elder care staff, and children), plus the parents of the preschool children and the school staff, gave their informed consent; one child asked that their face not be video-recorded, and this request was met. Additionally, one elder resident asked not to be videotaped or photographed as she had suffered a stroke causing paralysis on one side of her face. Any children who did not wish to participate remained in daycare. In addition, the children and their parents were asked if photos and videos of their artwork could be displayed during conferences and as well could be included in articles (with names removed). Utilizing the art as data was agreed upon by all parties. Additionally, after initial data analysis the researchers contacted the parents and discussed the findings to confirm and clarify any inferences made about the images. It should be highlighted the art as stipulated in the research statement, would be exhibited both at a multicultural center and the central library for weeks. The study complied with GDPR rules concerning privacy protection, data management, right to withdraw, data storage, processing, and transportation.

Five weekly sessions over a three-month period, that culminated in two weeks of exhibitions of the children's artwork at a multicultural centre and the central library. After each story session, the children created artwork to respond to the story. Each week the artwork was in different forms and modalities (photos, drawings, colouring, finger painting, collage). This was to allow the children different visual modalities to express themselves. Initially, we began with allowing the children to just draw using crayons and colour pencils. Slowly over time, we incorporated other visual artistic means. The

art was finished in the adjacent room of the eldercare home. The data consisted of participant – and researcher-produced video recordings of the six oral storytelling sessions, observational field notes, multimodal artefacts, and qualitative pre-and post-session interviews. There were two sets of video recordings, one by the researchers and one by participants.

The data analysis of the artwork and stories assessed the story themes compared with visual images in the children's artwork. The analysis utilized Kress (2010) multimodal mediation of knowledge and Pink (2008) visual semiotics. The research team, elder care, and early childhood staff as well as the elder storytellers confirmed and clarified with the children the meanings of the visual representation. The categories of analysis included colour, layout, visual representation connecting to socio-cultural practices, multimodal objects, and participatory actions. Additionally, past, present, and future identity was assessed in the artwork.

## **Findings**

The findings discovered moments of identity representation, connecting to socio-culture, context vocabulary and prior historical cultural practices. An example that illustrates this was when Anja shared her childhood memories in a small countryside parish. She also revealed that a famous Finnish clown, Pelle Hermanni, used to live in the same house as her grandmother. This interested the children. This story initiated their engagement. They asked about who lived in Jyväskylä back then and what it was like. Jorma had many stories and many photographs. These helped capture the children's attention and they asked many questions. Leila described being a young child in the countryside during the war. She narrated that there was no road to her home, nor did her home have electricity of any other modern-day conveniences. The family had to keep the house dark during the night due to night bombings. The boys were interested in asking questions about bombings and war. They were especially interested in the planes.

The children's art displayed visual discourse representing what moments connected to them the most. For each child it was different. Art reflected personal connections to the story. For example, the boys highlighted the aeroplanes in WW2 of the childhood stories as their grandparents' spoke of similar stories. Boys connected to action, planes items and the girls highlighted the people and surrounds. For example, in the topic of childhood, many of the children drew pictures of houses as a reflection of childhood



and Jyväskylä. While most of the stories described the hardships of past life in Finland, the children connected with the notion of family and home. They also integrated the idea that the elders, when they were children, lived through dangerous times (See figure 1–3 below).

Figure 1. Planes WW2



Figure 2. Nature no electricity



Figure 3. Black sun WW2



### **Findings – representation**

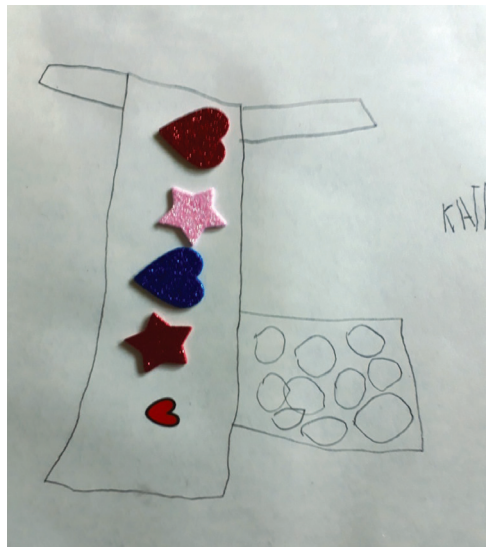
In the clothing session the children learnt about the older fashion. This was interactive as the elder storytellers brought in examples of clothing not just pictures. Anja had a lot to talk and show about the clothing of yesteryear. She showed the kids how the different aprons were put on for baking. The children tried on some of the hats and clothing. The listeners wondered how there were no paper tissues before but cotton handkerchiefs. During the clothing session, one transmigrant girl chose to utilize a Disney princess of colour. There were 'white' examples in the comic she chooses to use the Princess of colour. She said the girl in the picture looked more like her, white darker-skin and dark hair.

Figure 4. Representing Self



Additionally, the princess character she chose had a fancy long dress (ball gown). She said she thought that it represented what she thought Finnish grandparents might have worn in the past. Several children, when asked about their artwork, stated that they thought the vintage (old) clothes sounded like they would be more elegant. Hence, the use of glittery stickers to represent this feeling.

Figure 5. Beauty of old clothes



Certain images reflect objects the children focused on their art highlighted the knowledge taken from the stories, not the main action of the story. The art also displayed moral values such as beauty, heroism, strength in the pictures and with their choices from the magazines (using superheroes). Kids incorporated their lives into the arts. They utilized syncretic globalized images ex batman going fishing during the sports session. An example of syncretism was many of the pictures used both traditional Finnish comic characters (Moomin) alongside Disney or Minecraft (gaming). The choices reflected the transcultural identity of their lived in Finland. Additionally, the 3D sports visually represented the movement in sports including animation action characters such as Batman etc. The storytellers brought in fishing, skiing, and hiking gear for the children to see. They also told stories about going up to Lapland and falling through the ice when Nordic skiing on a lake. The children saw pictures of having to dry clothing on an open fire.

Figure 6. Globalization of sports



Figure 7. Movement in sports



The visual representation in the children's art reflected the interactive nature of the theme and the storytelling. The multimodal nature of the storytelling enabled the children played games such as hide the key. They learnt the song for picking a player. They also played the old Finnish 10 stick game. All these games allowed them to learn how children played in the past without any computers. It expanded their socio-cultural language and knowledge of Finnish cultural practices. The storytellers also played with old dolls and paper games. The children played hide the object games. This was very successful in engaging them to listen. The children asked many questions such as "How did you play with these?" "Whom did you play with?" "Where these expensive and popular?" The interactive nature of the game was represented in the 3D artwork below

Figure 8. Interactive storytelling



Multimodality in art allowed them to reconceptualize the stories from their perspective. They did not conceive the literal truth of the visual image but utilized the image or something they saw in the image to project what they wanted. Over the weeks, the children explained their pictures as being about the simple and emotional aspects of the stories. For them, this was represented through the visual colour and look of the pictures.

### **Conclusions**

The study illustrated children's responses to multimodal storytelling through the discourse of visual and art-based literacy. The findings answered, *to what extent can intergenerational multimodal storytelling benefit transmigrant, immigrant community engagement and identity?* There were three areas of interest regarding these responses to multimodal intergenerational storytelling. The first, notion was that a response to the storytelling, children often incorporated their lives into the arts including local and global perspectives.

A second finding revealed that the children's art displayed visual discourse representing what moments connected to them the most. The final finding was the interactive aspects of multimodality intergenerational storytelling. Through allowing children to respond to the stories by utilizing multimodality in the art provided them with agency and space to reconceptualize the stories from their perspective. Furthermore, the findings illustrated that *in a globalized world, children's relationships with multimodalities create learning (language, socio-cultural practices)?* The focus of the art highlighted socio-cultural practices, fishing, sports, and old clothing that provided new vocabulary and knowledge for the children. Therefore, intergenerational, multimodal storytelling often serves to transmit cultural values and family history (Luo and Tamis-LeMonda, 2017) and done as a multicultural community strengthens civic engagement. The children learnt about the past historical lives of the elder storytelling. Their art displayed taking moments from the stories and reconceptualizing them with modern visual literacy. Additionally, through providing opportunities for visual discourse this project over time hoped to connect other groups (immigrant with elder and children) with the hope of providing both local and newly arrived through storytelling.

The limitation of the study is the small group of participants. However, the videos during the multimodal intergenerational storytelling and the following art creation illustrates a need for future investigation. Oral history enables the reconstruction of shared memory through experiences. As the storytelling becomes multimodal and interactive, the visual discourse in the children's artwork reflected this. It went from literal drawings of events to representations of how the events connected to the children's present identity. The drawings became shared representational discourse of the process rather than just the story. These were children not familiar with Finnish historical culture. However, through multimodal intergenerational storytelling they became engaged. Moreover, their artwork illustrated the vocabulary and themes that the children engaged in.

Future research must investigate how with linguistic proficiency transmigrant children can learn, share knowledge and interact multimodally with story creation. As well, this process captured relevant significance for the children the greater their involvement because in the discourse process. As such, we argue we need greater interactional multimodal opportunities in intergenerational storytelling. This benefits identity and well-being of all the participants. Therefore, allowing the children through art-based literacy to respond to the stories enables transmigrant and immigrant children a space

to learn about socio-cultural practices of their present residency. Additionally, it enables emergent learners a space to communicate and express themselves.

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**I**NTERCULTURAL EDUCATION  
WORLDWIDE – THE SITUATION  
OF THE ROMA MINORITY



## **The significance of research into the Roma ethnic identity. Proposals for theories, methods, and research organization based on the own scientific experiences**

**Abstract:** The article is aimed at drawing attention to the research motifs explored by the author in his studies and, first of all, at raising questions about the sense of research into the Romani identity. An attempt is made here both to suggest some theories and methods which can be useful in identity studies and to signal the difficulties in carrying such research out. The major subject matter of the suggested research projects should address the problems of the Romani identity and culture, this ethnic group's participation in education, and their specific social and professional activity. What seems to be justified (after a reliable diagnosis of the needs, problems, prospects and possible solutions) is the unceasing need for designing programmes, projects and local policies which address the Roma and which come into being with their participation. However, the activities conducted so far should be subjected to an in-depth analysis and evaluation, also in regard to the specificity of Roma communities from various groups and countries. This might help to indicate the elements of their identity, as well as the level of joint participation in the context of the still incomplete integration with culturally dominating majorities.

**Keywords:** Roma, identity, ethnicity, education, integration, interculturalism, theory, methods

### **Introduction**

For many years, the problems of national and ethnic minorities with special focus on the situation of Romani people in Poland and other countries of Central Europe have been the main object of my scientific explorations. Therefore, it seems useful to share my experience and indicate the usefulness of some theories, the main problems with the organization of studies, as well as some fields worth further research. My scientific interests have developed while preparing a lot of research compliant with the pedagogical area

but also involving an interdisciplinary approach, field studies, often clearly non-positivist participatory action research. In Poland, the publications of educationalists successfully undertaking participatory action research have become available in the recent years as well (Červinková, 2012; Gołębiak, Červinková, 2010, 2013). There are more studies by foreign authors available, among others: Khanlou (2005), Oden, Hernandez, Hidalgo (2010), Levanon (2011). This subject matter is evidently connected both with my scientific background and with the above mentioned social activity. As regards my current investigations, the intention is to make an attempt to conceptualize and describe the social involvement for the Romani community and, first of all, the activity of the Roma themselves, in the context of their participation in actions for and with their own environment. Thus, the community of educators may become more aware of the recently undertaken (with growing frequency) action research in fieldwork, additionally justified by joint participation. What seems remarkable is also its emancipatory character. Field action research is particularly suitable for finding out the attitudes, behaviour patterns and social phenomena which can be understood only in the natural environment of the Romani, as opposed to an experiment or survey organized in partially artificial conditions. Field research is conducted in a place and in certain time, when observable events often happen. My studies have been carried out as parts of scholarships, internships, scientific and social projects, analyses and expert opinions (commissioned by local authorities and central government administration), grants and university statutory research. So far, In Polish pedagogy there have not been many research attempts at studying the social, cultural and educational functioning of children and adults of Romani ethnic minority in the conditions of Europe's cultural diversity. The previous state of knowledge in this respect, presented mainly on the grounds of ethnology, history or sociology, is comprised in the scope of intercultural pedagogy and comparative pedagogy.

### **Contexts, cognitive goals and scientific research**

In reference to the existing stereotypes about the economic activity of Romani people, their social participation, education of Romani children and youth, and in the atmosphere of no understanding of their otherness, it seems justified to aim at designing research into the specificity of this cultural otherness. This *otherness* (depending on ethnic identity) consists in a different way of looking at formal law, in a different approach to education of children,

social and vocational activity of the Romani and in incomplete integration with the culturally dominating community in their residence country. My attempt to prepare for such research effort starts with raising the initial question concerning the need and sense of exploring the significance of conducting field research into the identity of an ethnic group. The adopted research procedure – participatory intervention research – enables a transformation of social reality and the use of research results in practice. The qualitative-quantitative approach was applied: participatory observation, document analysis (research results, publications, legal acts, programmes, projects), interviews with representatives of the Romani community, various studies and expert reports (Kwadrans, 2013, 2017). In regard to the specificity of the research subject and due to undertaking some attempts to blur the boundaries between the object and the subject of the research, one may point to a particular kind of motivation behind such attempts. On the one hand – it is by no means an effort and scientific challenge, and – on the other hand – mere curiosity, a cognitive incentive. Therefore, a multicontextual motivation for the research can be indicated, which I have often applied: cognitive motivation, the community-related thread as well as the political and social one altogether.

Such an interdisciplinary approach to the problem incorporates sociological, politological and primarily pedagogical approaches. On the grounds of these disciplines of science, there are a few essential notions: ethnic identity, behaviour norms and patterns, social (mis)fitting, culture, education, integration, joint participation. The interdisciplinary approach is also aimed to determine differences in defining integration or participation more often than joint participation, an attitude to education, social and vocational activity by culturally diverse groups – here in the case of Romani people. Some attempt have been made as well to indicate alternative forms of social fitting of the Roma. The choice of problems is also determined by other factors, such as the still difficult social and legal situation and incomplete integration of the Romani in Europe and the continuously valid questions of the need for change. The current scientific goals include completing my previously attempted studies of the problems of Romani education as well as extending them by including other above-mentioned subjects. What should be emphasized is that, apart from ethnographic, sociological or politological works, there are still very few pedagogical studies on Romani ethnic minority and its social participation. Thus, the scientific goals should include a description, diagnosis, analysis and interpretation of the situation of the Romani in the context of their integration in numerous areas; a critical presentation of the

pursued actions addressing this group by international, government and self-government institutions as well as non-government organisations (their aims and methods), but – first of all – an in-depth study of their ethnic identity.

### **The course of the research**

The proposed research involves representatives of Romani groups in a few countries of Central Europe. What can be recommended for the purpose of this research is not the use of interview questionnaires (because some respondents might be illiterate) but of free interview. It seems valuable to enrich the materials with Romani leaders' opinions. First of all, however, the document analysis should be conducted of scholarly papers, official documents in the form of programmes, projects, or local policies. So far, the most effective action research has been conducted through participation in numerous projects aimed at Romani communities in those countries. Its aim has been to identify the attitude towards the processes of integration (assimilation). The conclusions drawn from the so far conducted studies have formed the basis for raising the main research problem which consists in the question: Whether and to what extent may the problems with Romani integration result from their cultural otherness contained in the elements of their ethnic identity, culture, ways of adapting to the functioning in the society of the culturally dominating majority?

The theoretical goals have been focused on organizing and collecting the knowledge on: the characteristics of the situation of the Romani, their culture, ethnic identity, social and cultural integration, adaptive strategies, specificity of their social and cultural capital, intercultural education, social change, transformation, European integration, globalisation. I have also made attempts to describe the Romani participation in the culture and education of majority societies, the execution of educational duty and their participation in education. It seems to be very important to emphasize the theme of education. In the context of research, in such studies it is obligatory to include the presentation or description of the Romani community's actions along with their evaluation.

Among other things, some attempts have been made in my studies to depict otherness in relation to education of Romani people in their residence country. Those studies have grasped the way the Romani perceive education and educational duty. What has been also presented are the relations between the Romani sense of identity and their attitude to education and their



participation in it. Numerous foreign internships and study visits in Poland have allowed me to collect materials through library study (of programmes, projects, specific legal regulations, documents of institutions dedicated to work for the Romani, associations, foundations). Interviews with Romani leaders and people involved in work for the Romani have allowed me to enrich the research material.

### **Characteristics of the studied group's ethnic identity – the theoretical context**

The main subject matter of the study is Romani identity as the foundation for the functioning of the Roma in the contemporary world as well as a determinant of their attitude to the culturally dominating societies, integration programmes, education system, and labour market. It should be stressed here that the Romani identity is one of the key notional categories. My intention is to indicate the theories that are useful in the interpretation of research results, as well as to indicate their organization and methodological premises. My own studies constitute the base here for sharing my experience which may help in designing research projects in the future. In my written works, I consistently try to use the term “Romani”, by which I mean not its ethnic sense but the political one. Despite certain negative language connotations that the term “Gypsies” convey, it is still used for the reasons of historical or merit-related correctness. Keeping in mind the diversity in the described community, “Romani” is used here in its political sense, which embraces all Roma groups. I am also aware that some of them do not use this ethnonym (Mirga and Mróz, 1994, p. 266–267; Kapralski, 2012, p. 7 and 77–135).

Gypsies/Romani – according to an American anthropologist and gypsologist Matt Salo (1979, pp. 73–96) – differ in terms of six basic criteria which largely influence different functioning of this ethnic group in many spheres of social life (Mirga, Mróz, 1994, pp. 267–269). To the present day, this theory has been used in descriptions and analyses pertaining to the Romani identity. The theoretical concept which allows researchers to systematize the determinants of Romani identity (Kwadrans, 2015) and has been used in the description of its related areas is Tadeusz Lewowicki's Theory of Identity Behaviours (Polish abbreviation: TZT; Lewowicki, 2001, pp. 161–164). Especially in comparison with the majority group, as Lewowicki claims, the concentration on a chosen minority group distorts the reality and disrupts finding out some more general regularities, circumstances, relations (Lewowicki, 1995, p. 20).

The Romani identity is still being transformed and is a subject to influences triggered off by social and civilizational changes. It tends to be enhanced by some elements drawn from other cultures (e.g. through education and personal contacts with members of other communities, media, the Internet) and also diminished to give way to some new, unknown areas. School curricula are a subject to modification which depends on the scientific and technological progress. Thus, science and politics should be linked with the shaping of identity. Communion in its traditional understanding is replaced by new institutions or organizations, very often impersonal ones (media, the Internet). Moreover, social and cultural identity of the Romani is undergoing transformation, which manifests itself in their increasing participation in the social, economic and political life of their residence countries. They are adapting more and more efficiently to constant changes, which is by no means irrelevant to their identity. What often occurs among the Romani is the doubling or tripling of their identity. While interviewing the Romani, I have dealt with many declarations of multidimensional identity. Jerzy Nikitorowicz accepts the possibility of the existence of many identity dimensions. In one of his books, the author introduces the Theory of Multirange and Multidimensional Identity (Polish abbreviation: TWiWT), the sense of which is the individual's consciousness in the process of developing a complex, multirange and multidimensional identity. It is treated as a creative effort of the subject who reduces tensions and contradictions between constant, heritable elements, resulting from being socially rooted in family and local community (such as the identification with significant individuals and groups, indigenous symbols and values) and variable, acquired elements, resulting from the reactions and interactions, social roles and positions as well as experiences of participation in the multicultural world (Nikitorowicz, 2017, p. 347).

A mechanism which controls the cohesion of Romani groups is the strongly developed inner social control in the form of a code of norms and an institution of "specific jurisprudence" (the rule of *mageripen*, *romanipen*, *manusipen*) (Courthiade, 2008, pp. 13–32; Marushiakova and Popov, 2008, pp. 13–77). While conducting analyses of Romani identity, these institutions cannot be forgotten. What might help here are some sociological theories – e.g. of social control (Siemaszko, 1993). It is meaningful that there are still so few emancipated Romani and that they are often rejected by the society. Among the Romani, the phenomenon is quite frequent of unsymmetrical social bonds (Ossowski, 1967, pp. 137–173). They would like to belong to a given country's dominant majority and they are convinced that they are

entitled to it and, at the same time, they feel rejected by this majority. Thus, it may be stated that Romani's subjective otherness is insignificant, contrary to the reflected otherness. Therefore, there are problems with integration in the scope projected by the cultural majority.

### **Characteristics of the research into the Romani ethnic group – methodological dilemmas**

The specificity of the research necessitates finding answers to the following questions: Who are Gypsies/Romani? Should gypsology or romalogy be mentioned? Are the researchers conducting social studies on Romani ethnic identity gypsologists/romalogists? Are these terms legitimate? Gypsology is a branch of ethnology and linguistics dealing with the study of the history, culture and language of Gypsies/Romani. Obviously, some interest in this community has accompanied it since their arrival in Europe or the beginning of their journey. However, the development of philological, historical and ethnographical studies must date back to the late 18<sup>th</sup> century. Nowadays, also sociology, pedagogy and other humanistic or social studies are involved in the research on the history, culture and situation of Gypsies/Romani. The name gypsology was adopted by the non-Roma and, therefore, the reference to the exoethnonym Gypsies should not come as a surprise. Currently, a discussion is also taking place on the very name gypsology, because in the institutional sphere there is the term romalogy, derived from the endoethnonym Roma. Some gypsologists divide the field into the traditional and contemporary approach to the Romani community as one extensive group and put emphasis on the awareness of group diversity and lack of the sense of community.

Romalogical studies are usually of an interdisciplinary character and are conducted with the use of various perspectives, e.g. of cultural anthropology, sociology, theory of culture, as well as philosophy or history, and more recently also of pedagogy. Research into the Romani provides factual evidence and is more and more often referred to as a separate field – romalogy. It is not comprised in the traditional status of science and is characterized by different approaches located in separate paradigms, for example in what Romani identity is and how it is to be studied. Thus, assuming that the Romani are a group that is internally highly diversified, it is not possible to conduct research aimed at making judgements about Romani people (Kapralski, 2012).

Yet, the most frequently undertaken studies on Gypsies/Romani are scientific efforts of linguists, historians, ethnographers, sociologists and less

often of psychologists or educationalists. What seems significant is that the researchers are usually non-Romani.

The most common difficulties in carrying out research are those resulting from the specificity of a group (punitive structures), lack of possibility of joining the group, problems of cultural differences, language problems, poor communicative and technological competences, passing on from individual to collective interviews, a disturbed relation between a researcher and the researched, mutual stereotypes, subjectivism, ethical implications, different levels of intercultural competences of the researcher and the researched, lack of clearly specified or abstract purposes (this is clearly seen in many projects implemented within EU programmes and in the evaluation of some studies after their completion), problems of forced utility of research or its only descriptive character.

It would be recommended to ask the following questions concerning the need to carry out research into Roma, especially into their ethnic identity: Is there any need? Are researchers authorised? How should they investigate? For the reason of the above-mentioned characteristics of the group and a definite need to depart from quantifiable analysis, it would be necessary to conduct fieldwork, ethnographic studies, action research, and to refer to a well-grounded theory.

## **Conclusions**

The presented study was aimed not so much at triggering a discussion on the need for research among the Romani community but rather at enabling the indication of its directions. Obviously, this required reviewing the key notional categories. The contents of this article might help in choosing most useful theories, methods and techniques of data collection and of making descriptions or analyses. Both the theoretical considerations and the experience of my own research make it possible to confirm that the key category in such scientific exploration is the notion of the Romani ethnic identity. Applying a different paradigm which ignores identity analyses seems erroneous and may lead only to unjustifiable conclusions or, very often, to wrong assumptions. Therefore, the studies on the Romani community – regardless of their aims and assumptions – should be designed with full awareness of the research significance of Romani identity. It seems recommended that the questions and problems raised in such studies should be formulated also in regard to this issue. The interpretation of research results, the scientific

procedure, the choice of methods, techniques and tools ought to take the category of ethnic identity into account as well.

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EMINE DINGEÇ

## **Education of the Roma in the late Ottoman period<sup>1</sup>**

**Abstract:** At the end of the 19<sup>th</sup> century, activities were initiated in the Ottoman State to increase the knowledge of the Muslims and Ehl-i Perde (those with a Muslim name but who do not fulfill the requirements of Islam) Kiptis (Roma) in various fields, particularly in religion. Imams were appointed to their settlement areas. Schools were opened. In the meantime, they were also recruited into the army where they received education/training in many aspects. The aim of this article is to examine the adaptation of the Roma into the Muslim society during the discussed period.

**Keywords:** Kipti (Roma), Ottoman State, missionary, education, school, imam

### **Introduction**

In the Ottoman Empire there was a period when the living conditions of the Roma (Kiptis) were improved. There are both domestic and external factors that influenced these developments. The domestic factor is that the larger, more dominant groups and Roma (Kiptis) minority groups were familiar with one another. This familiarity served as a guide in developing their habits of living together. This enabled them to determine problems and focus on solutions to these issues. The report dated 1891 submitted by Sadi Bey, a teacher at the Siroz Idadi – Mülkiye School, was significantly effective regarding this. The report submitted by Sadi Bay attracted great interest among Roma researchers. The whole text was published by Ceyda Yüksel (2009: 349–354). This report was evaluated as the first initiative concerning Roma by Ahmet Uçar (2009). Faika Çelik and Ömer Ulusoy examined this report closely (both

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<sup>1</sup> This article was presented at the Gypsy Lore Society Annual Meeting held in Iceland between 15–17 August 2019. Here, the article was reviewed and expanded further. I would like to offer my sincere gratitude to Elena Marushiakova who brought my attention to certain points of the topic.

in 2013). In his article, Çelik classified this report as an ideational source of the reforms on the Roma and an attempt to control the population that increased significantly with the migrations from Romania to the Ottoman State particularly with the abolishment of slavery (2013). Ulusoy's interpretation is somewhat similar to this (2013). The results of all these studies are consistent within their own framework.

Sadi Bey's report was, in all likelihood, influential in starting education activities for the Roma in the Ottoman Empire. However, there are two aspects that were overlooked. The first is what was considered the outcome of this report, that is, the opening of schools and the appointment of imams being conveyed as a development aimed at all the Roma, whereas the Ottoman State selected a target group for both the opening of schools and appointing imams. In other words, a program including all the Roma was not employed. The main aim of this program was to teach religion to the Kıptis, who claimed to be Muslims but were unfamiliar with the Islamic doctrines and were consequently classified as "crypto." This program was in fact aimed at the "Ehl-i Perde Kıptis" who I mentioned in my previous studies (Dingeç, 2015). Nevertheless, because it was difficult to distinguish among the Muslim Kıpti and Ehl-i Perde Kıpti, this included all the Muslim Kıptis. Secondly, the studies mentioned above are only based on the relevant report that classifies these developments as reforms aimed at the Roma. Yet, there is also an external factor that influenced these developments. This was American missionaries showing an interest not only in minorities such as Armenians and Greeks, but also in the Roma. These missionaries were targeting the Kıpti who were neither familiar with the basic principles of Islam nor complied with Islamic teachings. Apart from producing educated, religious individuals of high morals with the opening of these schools, appointment of imams and even recruitment into the army, there was also the intention of preventing these groups that were "in between" from becoming Christians due to the missionary activities. Taking all of this into consideration, I suggest that this was intended at establishing a common culture of education activities targeting both Muslims and Ehl-i Perde Gypsies. The point where I differ from the other two researchers mentioned previously is the claim that the state acted pragmatically and approached the topic with two main targets. This program included all the Kıptis.

The 19<sup>th</sup> century was a period where monarchy rule began to be abolished, and there were experiments with constitutional and republican rule. In this aspect, this is much different than the early modern period. The multinational empires gradually became national states. The new rights given to



non-Muslims of different ethnicity during the process of the reform movements that began with the Tanzimat were directed at protecting the Ottoman State policies of a multi-national position. However, towards the end of the 19<sup>th</sup> century the description of “millet” (nation) defined with the French Revolution began to conflict with the Ottoman definition of “millet.” In the Ottoman State, millet represented individuals of the same religious group, whereas in the 19<sup>th</sup> century non-Muslim subjects adopted the identity perception dependent on ethnicity. They took steps to become a national state. Although the Roma did not take such initiatives, this produced the formulas of uniting state subjects. One of these was gathering citizens of the state under the same umbrella, namely Islam. Developments aimed at the Roma should also be assessed within this context. Indeed, during this period Roma people also gained headway in acquiring the citizenship (tebaa) status.

In my studies mainly on the Early Modern period, I discovered that, as far as this was reflected in archive sources, the Ottoman State’s stance towards the Roma materialized within the framework of the provisions of law both in terms of their employment in state services and in judicial processes. While those who committed crimes were described as *ehl-i fesad* (corrupt people), those who had an occupation were employed for state services and the harmless were called *garip-Gurbet* (Dingeç, 2016, p. 68). Until the 19<sup>th</sup> century, the relationship of the Roma with the state only concerned issues such as employment, tax or court cases, whereas many topics not previously expressed concerning Roma were now included in commission records, reports and enactments. Issues concerning the Roma were determined. It was established that they lived in poverty; the poverty they suffered was due to ignorance and they could only overcome this with education. On the other hand, the Roma that claimed to be Muslim for centuries, who were registered under Muslim names, were invited to Christianity sometimes by force and sometimes by encouragement, while the Roma of a different Christian doctrine were invited to Protestantism. Education was the only means of the Kiptis resisting this pressure and encouragement. In view of this, it was decided that Roma should be educated. The main sources regarding this topic are some documents from the Presidential Ottoman Archives and missionary reports.

### **Missionary activities**

In the 19<sup>th</sup> century there were many missionaries active in the Ottoman territories. Generally, the aim of these missionaries was spreading Protestant-

ism. The Roma were also included in their field of interest. Christian and Ehl-i Perde Kiptis were a target for the missionary's religious propaganda. Ehl-i Perde Kiptis, who were Muslim but neglected the obligations of Islam, were at particular risk in terms of changing their religion. As known, the idea of being a Muslim according to some was simply having a Muslim name (For an anecdote see Marushiakova and Popov, 2006, p. 85).

These groups who were already accustomed to the Islamic faith but had no knowledge of Islam attracted the attention of missionaries. Missionaries included the Roma in their activities because they would be able to encourage them to change their religion easily due to their lack of knowledge. Initially, they took notes of the Roma or groups resembling them in terms of their lack of knowledge (*The Missionary Herald*, V. XXXII, 1863) Missionaries observed their numbers, occupations and religious beliefs. These observations served as a preliminary study for launching activities for teaching Christianity in the places and time they considered suitable. They then put their projects into practice. The activities of Mr. Farnsworth, assigned to the Central Anatolian Region are rather interesting. In a letter dated 4<sup>th</sup> March 1868, Farnsworth explains teaching Christianity to a group of the Roma called "Ele-kçi" with a striking example. Here he relates that a Roma who was too old to learn began to read the Bible. According to Mr. Farnsworth's evaluation, there were seventy Protestants in Sungurlu, close to Yozgat. There were many people among these individuals who were convinced into joining a different branch of Protestantism. In all likelihood, this group was the Roma the Ottomans called Ehl-i Perde. According to the report, the "Elekçis" who were a group of the Roma were enthusiastic to learn the Bible. In Sungurlu the Elekçis were between three-four hundred in number. According to Farnsworth's narrative, the story of Uncle John, a member of this group, is as follows:

"Several years ago, one of them called Uncle John came to learn to read the Bible. He was an elderly man. He attended school with the children and began to read the book using syllables. The people laughed at him and mocked him saying "if a bear can learn to read so can Uncle John." But he was determined and now he can read very well. The Armenians we as surprised at this as the Gypsies were." (Farnsworth, 1868, p. 193).

If Farnsworth is not narrating his own works with exaggeration, then Uncle John learning to read the Bible was an excellent example to encourage those who were just beginning to learn.

Concerned that the missionaries could entice the Kiptis to Protestantism, the Ottoman State began to take action. Indeed, this was clearly defined in the report mentioned above (BOA. Y MTV, 47/180)<sup>2</sup>. The state taking action to enable the Roma to learn more about Islam and become well educated was surely not a coincidence. The timing of this is particularly significant. The purpose of this was to increase the religious knowledge of the Roma and therefore protect them from the missionary activities. Indeed, one of the reasons the Roma failed to observe the Islamic codes properly was their lack of knowledge concerning the Islamic faith. While Muslims were gathering either at mosques or madrasas and learning about their religion, the Roma who lived on the margins of the society were deprived of this knowledge. In view of this, the state that neglected the Roma for centuries in terms of education planned to provide them with a religious education.

### **The Ottoman State providing religious education to the Roma**

According to the traditional state perception, a state had three main duties: protecting its subjects, procuring justice and increasing the level of welfare by protecting production resources. Apart from these basic duties, needs such as education, healthcare, social and cultural activities were met by foundations and the wealthy. The education provided at these foundations was based on religious education. The 19<sup>th</sup> century was a period when the Ottoman State abandoned its traditional state perception. In this century, the state expanded its fields of obligations mentioned above. Significant steps were taken particularly in the field of education (Kodaman, 1991, pp. 91–129).

When the living conditions of the Roma are studied from among the Ottoman subjects in the relevant period, it is obvious that they were neglected compared with other groups. The state generated and materialized policies so the Kiptis could learn their religion better and to provide them with better living conditions. The report submitted by Sadi Effendi, a teacher at the Siroz İdadi-i Mülkiye School, served as a guide on how they were to be educated. Sadi Effendi's proposals included the Roma learning how to read and write;

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<sup>2</sup> "...as the English missionaries can easily convert these to Protestantism and due to the probability of benefitting from the British policies in the future, to prevent them luring many of the five hundred thousand Kipti Muslims and many from the rural areas, the Kiptis condition must be improved..."

learning about religion, the state, Islam and humanity. It was decided that on the basis of this petition approved by the Sultan, the Roma should receive religious education and learn to read and write. While the petition in question mapped the course for the Roma to escape this deprivation, it also shed light on the relationships between the state and society that had continued for centuries. The most important thesis put forth by Sadi Effendi was that Roma who earned a living as ironmongers and laborers were never involved in theft. That is, if the Roma had an occupation they could escape poverty and therefore avoid misconduct. Owing to this education, they would perform the duties prescribed in Islam by adopting the moral standards of other members of the society. In which case, Kiptis named Ahmet, Mehmet and Ali would be familiar with the principles of Islam and would be able to proclaim the declaration of faith (kalima shahadat). Kipti women called Amine, Aisha or Fatma would not walk around the market place wearing revealing clothing (BOA. Y. MTV, 47/180). Nevertheless, the protection of the Ehl-i Perde and Muslim Gypsies from the missionary activities depended on these individuals receiving religious education. Although a significant part of the Gypsy population living in the Ottoman Empire was Muslim, some were totally ignorant regarding the Islamic principles and duties.

In parallel with all these aspects, three methods of educating the Ehl-i Perde and Muslim Kiptis were determined. The first was appointing imams to teach the Islamic religion in places where there was a concentration of Kiptis; the second was opening schools for Kiptis, while the third was recruiting these individuals into a branch of military service where they would receive some kind of basic education.

Appointing imams was the most economical, effective means of teaching the Islamic religion quickly regardless of the place. Imams were not only capable of gathering people, but also knowledgeable and skilled in conveying the principles of Islam. Moreover, they constituted a major section of religious officials. In view of this, imams were assigned to places where there was a population of Kiptis to give them and their children religious education and they received a salary for this duty<sup>3</sup>. Imams, who were responsible for performing the congregational prayers, taught the Muslims and Ehl-i Perde about the Islamic faith.

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<sup>3</sup> On 17<sup>th</sup> September 1889, an imam was appointed to provide the Muslim Kiptis living in Kragovach, that had seventy dwellings, with a religious education for a salary of three hundred kuruş. See BOA, İ. HR. 315/20204; Sezgin, 2015, p. 115.

Imams and mukhtars (heads of villages/towns) were sent to new Kipti neighborhoods that were established in later periods. In 1893 for example, a group of more than forty Kipti immigrants came from Rumelia. An imam was appointed to teach this group that settled in Bursa (BOA. TS. MA. d, 9367). Imams and muftis were also sent to territories lost by the Ottoman State so Muslim subjects could perform religious duties and activities. This was based on the clause concerning the freedom of worship of religious groups in the Treaty of Berlin that was signed in 1878 (Furat 2013:85). Therefore, the Ottoman State continued to appoint imams to Serbia that gained independence in 1878. A mufti was also sent to Nis (BOA. Y. A. HUS. 276/54).

Despite the religious freedom mentioned in the Treaty of Berlin, there was news that between the years 1892–1893 some Muslim Kiptis changed their religion. According to a document dated 22<sup>nd</sup> October 1892, the Peryajovski Kray newspaper published in Rostov reported that some Muslim Kiptis changed their religion. Yet, after some investigation, it was reported that this was unfounded (BOA. Y. A. HUS. 266/16). Moreover, Istanbul continued to receive similar information. There were even claims that the Muslim Kipti were forced into accepting Christianity or threatened that they would have to leave the country. In May 1893, when such reports began to increase, the Grand Vizier requested that the Ministry for Foreign Affairs held an investigation into the matter (BOA. Y. A. HUS 274/43). As a result of the investigation carried out by the ambassador of Belgrade and the mufti of Nis, this report was also refuted. According to the reports issued in June 1893, the Serbs proposed that the Muslim Kiptis in the towns of Pirot, Şehirköy and Alpalanga changed their religion, but the Kiptis rejected this proposal (BOA. Y. A. HUS. 276/54).

All these meant an increase in the Ottoman State's activities for religious education both domestically and abroad. As a result, the Ottoman state opened schools in certain regions to educate the Kipti children, rescue them from a life of deprivation and provide them with a lifestyle of higher standards when they completed their education. These schools were established in Rumelia where there was a concentrated Kipti population. Kosovo, Durres, Tekirdağ, Bitola and Shkoder were just some of these places.

Basic education was provided in these schools known as "İbtidai Mekteps" (Primary Schools). Among the lessons in these schools, there were "Elifba (Arabic alphabet), Qur'an, tajwid (Qur'anic pronunciation), ilmihal (situation sciences), morals, Ottoman grammar, spelling, recitation, compendium of Ottoman history, summary of Ottoman geography, Islamic calligraphy" (Baltacı, 2004, p. 7).

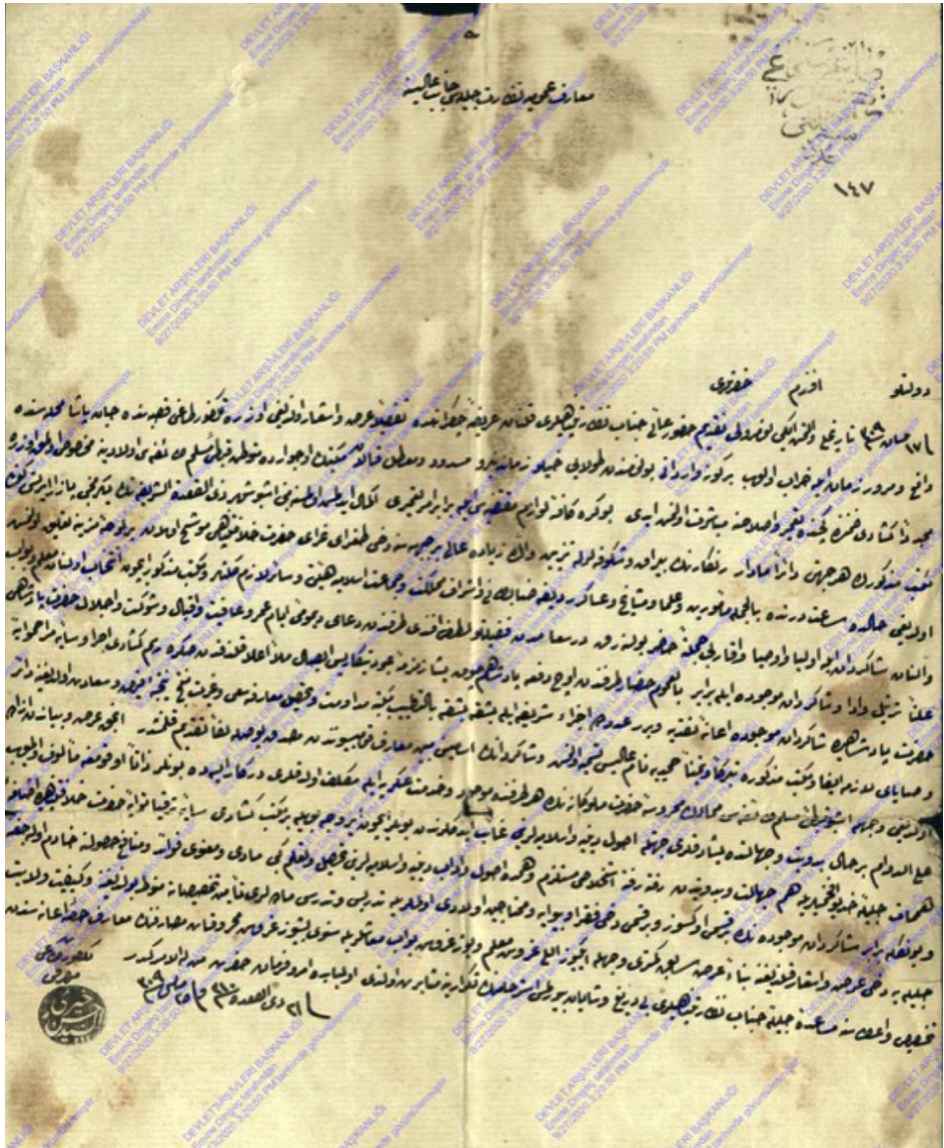
Buildings were not constructed specifically as schools. Generally, a house was rented and converted into a school. Teachers, janitors and assistants were appointed to work in these schools. The costs of schools were met by the provincial authority, education foundations or community funds (MF. MKT. 135/81; 182/110; 191/9; 756/40; 1017/47). In the Kosovo province for example, a school was established in February 1891 for the Kipti children. This school was a house rented for three mecrediye (a monetary unit of that period). The head-teacher received a monthly salary of two hundred mecrediye, the second teacher one hundred, the janitor fifty and other employees forty mecrediye. Education was planned from February until the fifteenth of June. The Kipti children enjoyed attending this school. In 1891, there were more than one hundred and thirty students attending the school (MF. MKT. 756/40)<sup>4</sup>.

At the end of the 19<sup>th</sup> century, there was a Muslim Kipti group consisting of three hundred and twenty six males and two hundred and five females close to Terkos in Tekirdağ (MF. MKT. 182/110:1). After realizing that Muslim Kiptis here had began to forget their religion because they had no religious education, a school was opened in the Can Paşa neighbourhood for Kipti children. This school would prevent the Kiptis from being “ignorant and uneducated” and enable them to become “literate” individuals and enter the “adab-ı İslamiyet dairesi” (the circle of Islamic morals). But after a while the Hamidiye İbtidai Mektep was closed due to insufficient funds to pay the employees and for repair costs. The topic of reopening the school was raised again due to the same reasons. The Education Commission generated plans regarding covering the costs of the school. The school was decorated with flags and flowers and reopened with the chants of “long live the padisha.” (MF. MKT. 182/119:1) In 1893, forty one male students between the age of five and fifteen attended the school. At this time a teacher was employed at the school for a monthly salary of two hundred and fifty and a janitor for one hundred kuruş (MF. MKT. 182/110:5).

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<sup>4</sup> For example, Şahin Effendi was assigned to the school opened in Durres in 1906.

Document 1. A document regarding Opening a School for the Kiptis in the Can Paşa Neighborhood in Tekirdağ (1893)



Document 2. Names of Kipti Children Attending the Hamidiye Ibtidai Mektep in Tekirdağ (1893)<sup>5</sup>

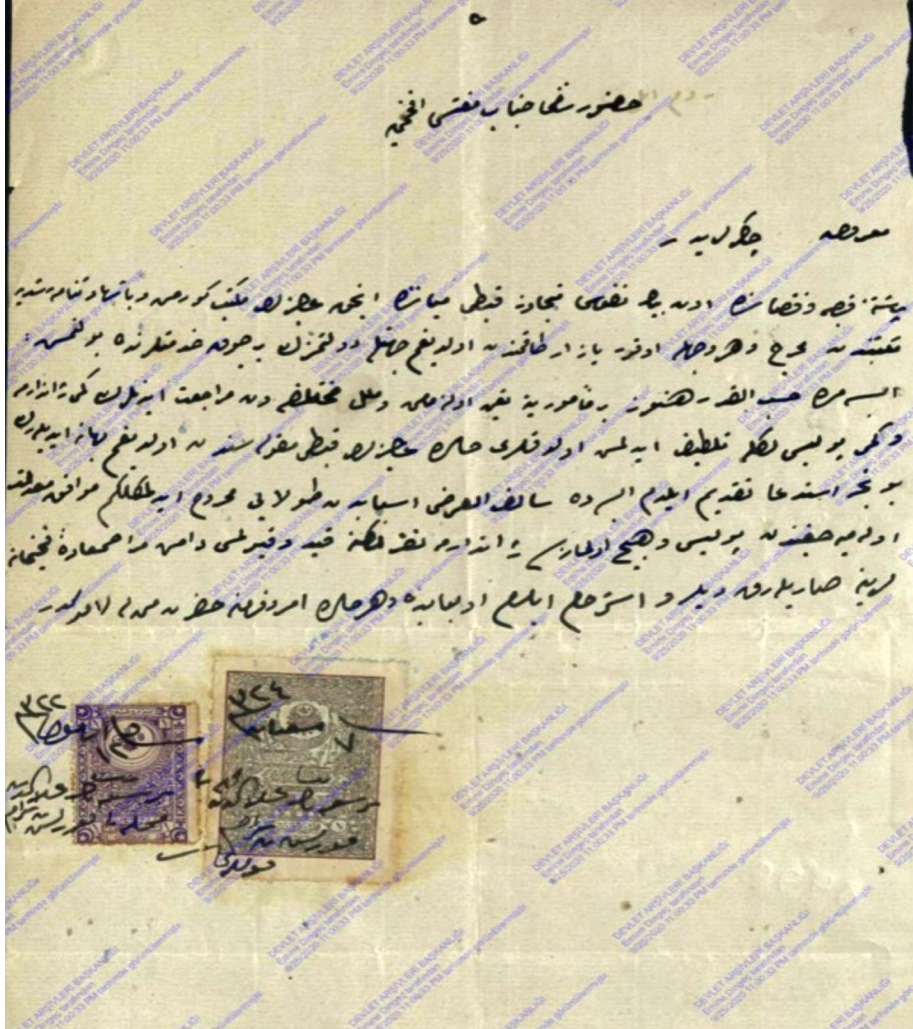


BOA. MF. MKT. 182/110/5; Sezgin, 2015, p. 124.

<sup>5</sup> Top Mehmed oğlu Ahmed, Şaban oğlu İbrahim, Karındaşı Mehmed, Kapıcı Değirmencioğlu Bahaeddin, Kebapçının İzzet oğlu Hüseyin, Hüsmen oğlu Ali, Canbaz Hürşid oğlu Hüseyin, Demirci Mehmed oğlu Mehmed Ali, Demirci İbrahim oğlu Hüseyin, Canbaz Derviş oğlu Rasim, Mumcu Salih oğlu Hasan, Arabacı Mehmed oğlu Kadir, Deli Hasan oğlu Salih, Hamal İbrahim oğlu Mustafa, Hamal Halil oğlu Ali, Hamal Ahmed oğlu Hüseyin, Devci İbrahim oğlu Kadir, Hamal Keleş Hüseyin



Document 3. The petition of Kurtiş bin Bayram to become a State Official



BOA, TREI.ŞKT, 97/9668

oğlu İsmail, Hamal Mehmed oğlu Veli, Hamal Hurşid oğlu Hasan, Kara İbrahim oğlu Mehmed Ali, Kirmanlı Ahmed oğlu Mehmed, Sagir Emin oğlu Süleyman, Hamal Ahmed oğlu İsmail, Azman Mehmed oğlu Hasan, Hamal Mustafa oğlu Veli, Tatar Halil oğlu Osman, Mehmed oğlu Osman, Külahçioğlu Salih Mehmed oğlu Mustafa, Kolcubaşı Hasan oğlu Ömer, Canbaz Kadir oğlu Hasan, Diğeri Tahir, İlyas oğlu Haşim, Mehmed oğlu Kadir, Halid bin Osman, Uzun İsmail oğlu Hüseyin, Hüseyin oğlu Tahir, Çorlulu Süleyman oğlu Receb, Diğeri Mustafa, İsmail oğlu Hüseyin.

Nevertheless, Kiptis who graduated from this school had difficulty in finding a job in the state departments. In a petition dated 27 September 1906, Kurtiş bin Bayram, a literate individual who graduated from the Rüşdiye school, explained that although he was employed in various places he was unable to become a member of the police force or gendarmerie. He stated that the reason he was not employed was because he was Kipti (BOA. TRF. ŞKT, 97/1668) Although there is no information available regarding the other graduates, Kurtiş draws attention to an important issue here.

The third factor mentioned above was the Roma being recruited into the army. Two aspects were taken into consideration regarding this. The first was fulfilling the demand for soldiers that increased in the 19<sup>th</sup> century. The second was the belief that they would fulfil their religious obligations and therefore enter the circle of Islamic morals<sup>6</sup>. Although there were reservations at the beginning, in 1873 they began recruiting the Muslim Kiptis into the army. It was agreed that Kiptis recruited into the army would be exempt from the “Kipti” tax (BOA, A. MKT. MHM. 472/53; Yılgür, 2018, p. 282; Yüksel, 2009, p. 341).

In the Ottoman State, they were not only taught how to use weapons and war strategies in the military. They were also taught the value judgments of the society and basic education such as reading and writing. In addition, all military requirements were fulfilled by the soldiers. These duties were carried out by sharing the responsibilities among the soldiers. Discipline and strict rules were enforced to increase the psychological and physiological resistance of the soldiers. Training for the adaptation into social life was also provided. In this way, the soldiers became accustomed to difficult living conditions. The purpose of this was to make the soldiers resistant and strong.

## Conclusions

In this study, there is a different interpretation than in the documents which emerged from previous archives. In this paper, the reports that researchers classified as a reform and other developments were interpreted as establishing a common culture among Muslims. This paper explains that the

<sup>6</sup> “asker alınan nüfus-ı Müslimine bir i’âne olmasıyla teneffüslerini mücib ve diğer hayme-nişîn olan tâ’ifenin dâhi bu hevesle iskân ve dâ’ire-i ‘ırz ve edebe idhâllerini mücib olacağı gibi Rumeli kıt’asında bunlar pek çok hâne ve nüfus olmağla böyle bir kıt’a-i nâzikede öyle binlerce nüfus-ı Müslimeye İslâm nazarıyla bakılmayıb dâ’ire-i cem’iyyet-i İslâmiyeden eb’âd olunmaları tecvîz buyrulacağına binâen...”

programs of reforms and change claimed to be aimed at the Gypsies were in fact targeting the Ehl-i Perde Kiptis who were not properly perceived by researchers. Because it would be difficult to distinguish between the Ehl-i Perde Roma and Muslim Roma, all the Muslim Kiptis were included in this education program.

Recapitulating this, the education programs were not intended for all the Roma. In view of this, it would be wrong to perceive the discussed situation as a reform. However, the fact that this did not include education on the whole should not be evaluated as a shortcoming. The Roma who were not included in this education program were the Christian Roma. Christian Kiptis were not included in this program because this would be religion based. In this sense, it can be suggested that the “Ottoman Peace” classified as the approach of tolerance towards religion continued in the 19<sup>th</sup> century. All of these were carried out as activities to enable the establishment of a common culture and increase experiences of a common life.

The end of the 19<sup>th</sup> century was a period where the Ottoman State was confronted with its negligence towards the Roma communities. The lack of education among Roma was classified as an inadequacy of the state. The notion that corruption and misconduct could be reduced with education brought hope for change. The belief that having a profession would save individuals from deprivation was embedded. However, although education was effective in terms of the Kiptis improving themselves, it was not as effective in enabling them to find a profession.

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IAN HANCOCK

## **On the history of Roma schooling in the USA**

**Abstract:** The paper comprises a retrospective overview of the educational situation of the Roma in the USA. In contrast to the European situation, efforts to establish schools for Romanies in the United States have been both few in number and – with only a couple of limited exceptions – unsuccessful. There are approximately one million Romanies in the USA, a number which is slowly growing and till now there are any schools established for Romanies to learn their mother tongue or to get integrated in the mainstream educational system of the USA.

**Keywords:** Roma, Roma education, schooling, USA

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### **The beginnings of schooling for Romanies**

The involvement of Romanies with special schooling (“alternative” or parochial schooling) dates from about 1965, and began in Richmond, near San Francisco in northern California. The 1960s was the decade of emerging ethnic self-assertion, and minority programs were beginning to flourish, supported by affirmative action. Yet, the Romanies were a special case, because while the larger society was entirely familiar with the African American and Hispanic American minorities – populations numbering in the millions – it had only the vaguest of notions of the infinitely smaller Romani American presence, to the extent of being unaware of its very name Roma(nies). The concept of “Gypsies,” on the other hand – a name also used in self-reference – was widespread, though based in fictionalized stereotypes rather than in real-life experience. For this reason, the agencies which were approached and which were willing to accommodate Romani students, such as the Municipal Social Services Department, the Volunteer Bureau, the California State Service Center and so on, made no special provision for them. No permanent program was established, nor were these provisions centralized, and no school resulted. Nevertheless, this brief exposure to the classroom was sufficient to stimulate the interest of both the students involved and their

parents, who were aware that at least some formalized basic education was becoming necessary in an increasingly technological world. It was in this framework that the first successful Romani school in America was eventually established, a school which lasted for seven years.

Acknowledgment must also be made of the pivotal role played by Miller Stevens in 1968, who was then living in Tacoma, Washington. After learning of the Richmond initiative, he traveled to Washington DC to meet with officials of the Department of Health, Education and Welfare to make them aware of the needy situation of the Romani American population. He saw that other minorities were getting recognition and assistance, and wanted the same for Romanies. Indeed it was Miller Stevens who was responsible for getting Romanies recognized as an official ethnic minority by the DHEW. He began a head start program for 15 Romani children in Tacoma out of his home in the summer of 1968, funded by the Office of Economic Opportunity.

### **Romani attitudes towards schooling**

From the traditional Vlach point of view, formal schooling has not been regarded as a good thing. It requires that Romanies enter the non-Romani world, which is seen as polluting and counter-cultural. Not only is the environment unclean – particularly with regard to the toilet and cafeteria facilities, but equally unacceptable would be the seating of boys and girls in the classrooms, and the topics addressed in the curricula. It would also require formally identifying oneself and filling out paperwork, and spending a fixed amount of time in a non-Romani-controlled environment. The classroom is seen as a place to learn to become *gadžikanime* or “Americanized;” there is nothing in the schoolbooks about Romani history or contributions, and when “Gypsies” turn up in the classes they are invariably represented negatively in works of fiction – especially children’s fiction (Hancock, 1988; see also Claveria and Alonso, 2003) – and the historical figures presented as heroes in Western culture are all too frequently the same individuals who sent Romanies into exile or even to their deaths. Schools are seen not only as environments that do nothing to teach a child to be a better “Gypsy”, but which seem determined instead to homogenize and de-ethnicize that child. Stories about children’s interaction with domestic pets, for example, send a different message to the pupil from the values taught in the home. Stories about structured mainstream domestic life present a picture foreign to the Romani child, and newer, diversity-conscious storybooks, about *e.g.* same-sex parent families are completely confusing and

disturbing. School records may be used to keep track of the whereabouts of Romanies in a community by the authorities; Romani children are often targeted by their classmates once their ethnicity is known; one Romani adult remembered with bitterness “Oh God, it was murder going to school; they wouldn’t sit beside you in the seats” (Anon., 1973a:5). Nick Dimas addressed these issues most directly (Hancock, 1975, pp. 45–46):

“In the United States, the continuing internal solidarity and resistance to acculturation of the American Rom is a phenomenon that merits closer attention. Although the underlying social dynamics of this cohesion are as yet obscure, one of the prime techniques which maintains this cohesion is not. They avoid the school system like the plague. While most other U.S. minorities are boycotting, busing and organizing to obtain better education for their children, the Rom are, by any means at their disposal, keeping their children at home. As a result of this mass truancy, the majority of adult Rom in the U.S.A. are illiterate or, at best, functionally illiterate (fifth-grade reading level). If the origin of this practice of education-avoidance is rooted in custom and tradition rather than in a consciously organized group policy, the results of the practice are no less effective in maintaining the solidarity of the group. And if we use the tolerance of marriage outside the group as an indication of group solidarity, they are solid indeed. The school-avoidance tradition and its resulting illiteracy acts in five specific ways to maintain the non-acculturation of the Rom:

1. The minimalization of time at school reduces proportionately the influence of the teacher’s value system on the Roma child, and effectively eliminates the peer-group pressure of the other children, two of the tremendous forces in the socialization process;
2. Illiteracy prevents any socialization in the direction of the majority culture through the written word. It forestalls identification with historical and cultural heroes in books and novels;
3. Illiteracy ensures that Romani will remain the first language of the individual Rom, with the resulting reinforcement of group values which occur when he speaks mainly to and in the company of other Rom;
4. Illiteracy limits the defection to the majority culture via the occupational route, as only the most physical, menial and low-paying jobs are accessible to an illiterate in the U.S.;
5. Illiteracy tends to discourage intermarriage between Romani males and non-Romani females since the husband’s income is severely limited, and tends to remain so.

It is plain that the integrity of the American Romani community is maintained in great part, by severely circumscribing the options of the individual Rom. It goes without saying, however, that any socialized member of the Romani community does not himself feel oppressed or deprived by his lack of reading and writing ability—rather he feels ‘liberated’ from the ‘craziness’ of the gadjo community, much of which he ascribes to reading and writing.”

Sometimes the singling-out of a Romani pupil can be for other reasons, motivated not by animosity but by paternalism, but discriminatory all the same. I can relate an anecdote concerning my own daughter Melina who some years ago at the age of about eight, came home from school one day terribly upset. She was hurt and confused because one of her teachers, of whom she was very fond, had told a boy in the class who was misbehaving that if he didn’t settle down she would “sell him to fifty Gypsies.” Melina wondered why a teacher she admired so much would have such negative feelings about Gypsies. I called the woman at her home that night and explained to her that Melina was a Romani girl, and that she had been very upset by the remark. The teacher was embarrassed and profusely apologetic, claiming that she did not know “Gypsies” were a real ethnic population. The next day, however, she told the class that she had a “surprise” for them; that they had “a little Gypsy girl in the class; Melina is a little Gypsy.” From that point on schooling became increasingly difficult for my daughter, and we eventually removed her for placement in a different school. When I asked the principal in that second school to remove certain children’s books from the school library which presented Romani characters in a damaging stereotypical way – this was prompted after receiving a self-congratulatory circular from the school announcing that in the interest of sensitivity to ethnic diversity numbers of books (such as *Little Black Sambo*) had been taken out of circulation – I received a letter telling me that the characters in the books were Gypsies, not Romanies, and that Gypsies were fictional beings, distinct from Romanies who were an actual ethnic people. The books remained.

### **Attempts to accommodate Romani culture**

The Richmond school was fortunate to have as its first principal Anne Sutherland (then Louis, and later to author Sutherland, 1975). Ms. Sutherland recognized the importance of incorporating the priorities of the Romanies, which were both culturally and pragmatically determined. Culturally, Romanies needed to be on the school board itself, to oversee behavior, meals,



class topics and so on. Boys and girls were to sit separately for instance. Pragmatically, they wanted such topics as reading and writing to be taught, but were not interested in history (of no practical value) or mathematics (already known) or gymnastics (inappropriate culturally). Because this school, which materialized in 1970 out of the various earlier programs, was initially unfunded and wholly supported by volunteers, the school board was not subject to control by any funding body. Ms. Sutherland had the wisdom to sit back at the board meetings and let its Romani members make the decisions. In 1972 the new principal, Janet Tompkins, was able to obtain the first state funding for the school, which lasted until 1977.

### **Other programs**

A year after the Richmond school closed down John Ellis, the leader of the Portland, Oregon, Romani community went to the State Governor to ask for a community center for the Romanies in his area. Ellis wanted a building for social events, but which would also incorporate a classroom, in which traditional Romani values, as well as literacy, would be taught. There were 250 school-aged Romani children in Portland at that time. The response was positive, though the Portland School District's relations officer was adamant that such a project could only be transitional-set up to prepare Romani children for their eventual entry into the public (i.e. state) school system. A compromise was reached, after other Romani leaders were brought into the debate, and a three-part program developed: first, a summer school at Portland Community College for young adults over the age of 18, secondly a vocational training program for younger children, funded by the State Welfare division, and lastly afternoon and evening classes for Kindergarten through eighth-grade. These were held in the Romani business district of the city, and began in the summer of 1978, supported by funding from the Portland School District, the State Fund for Disadvantaged Children, Federal Impact Aid, and Title One. But it was always made clear that the intent was clearly to prepare the children to enter mainstream schools as quickly as possible. While John Ellis enrolled his own three children in school (the Vestal School), he was in a distinct minority; most Romanies in Portland were just not interested. Others pulled their children out of the classes because they were being ridiculed and bullied. This was worse for the older children, those who were unable to read, since the rest of their non-Romani classmates could. Their non-native command of English also made them stand out from

the rest of the class. At the point of its greatest enrollment, there were only 30 children attending, and then sporadically.

The problem was tackled by the school district's decision to put two Romanians on the payroll as "Special Gypsy Counselors;" they acted as liaison between the parents and the administration, and worked with a non-Romani American who specialized in "disadvantaged" pupils. While the Romani children, as young as four and five, attended regular school, they only stayed for two or three hours at a time, following the wishes of their parents and the recommendation of the Counselors. The school board was happy to comply.

Some of the children in Portland still go to school, but most do not. The Vocational Training School program foundered after the second year, and died (Rubin. 1980, pp. 72–73).

In the same year (1973) that John Ellis approached the Oregon State Governor, in Seattle in Washington State another Romani leader, Ephraim Stevens, was attempting the same thing. Like his brother Miller similarly civic minded, he worked during the early 1970s as a community organizer for the King County Economic Opportunity Board, which he asked for funding to establish a "Gypsy" Multi-Service Center, a move stimulated in part by John Ellis' action, and by the fact that Seattle's Chicano community had just received over \$130,000 for such a center. He was initially refused, being told that the Romani population was too small to qualify – it didn't exceed 500 at its maximum – to which it was countered that to favor one minority over another on grounds of numbers was discriminatory. Bowing to criticism the response was that the "Gypsy" Community Center was set up in the city, headed by Stevens and funded by the Urban, Rural, Racial and Disadvantaged Education Program, which contained a day school for young children and an evening literacy class for adults. There were six children to begin with, a number which quickly grew to 25. Stevens hired a female university student to teach, and according to his own testimony, she took over the program and gradually eased him out. She was followed by three more non-Romani directors in succession, Lesley Easton, Barbara Cemenio and Carolyn Hall. By 1981 the Gypsy Alternative School occupied two buildings and had two teachers, with 40 students registered, though only 26 came regularly to class. By 1983, there was just one teacher employed there because of lack of funding (Whistler, 1983, p. 14). The Culture Center eventually closed down, but the school continued to exist, for many years with the involvement of the late Dorothy (Bora) George, a local Romni, and later Paul Stevens, brother of Kaiser Stevens of Tacoma. It was the longest running Romani alterna-

tive school in the country, but it has been closed for over three years now. Dorothy George spoke often to me of re-opening it, but was not successful in finding the means to do so.

At the same time, another Romani leader, James Marks, in Spokane, Washington, obtained funding from the Spokane Work Exchange Program for Young Adults, and established the “Gypsy” Cultural Center in a disused army barracks. For a short time it offered an evening class for small children, though no day classes, and very quickly it transformed to a community and sewing center for women, eventually closing down altogether after about six months. Marks’ three children attended both state school by day, and the “Gypsy” school in the evenings. James Marks cannot himself read or write. The existence of a similar venture in Tacoma, Washington, began by Kaiser Stevens and funded by the Division of Vocational Rehabilitation, was more successful-though stimulated by a 1975 juvenile court ruling that Romani children not attending school were liable to be placed into foster homes. This led to a proposal entitled the “Gypsy” Educational Development Program’s being submitted, which asked for \$152,000. Its authors are not specified, but the proposal is flawed in its understanding of the Romani American population, and its design suggests strongly that it was meant at least in part to provide a framework for somebody’s doctoral thesis. What did survive in Tacoma was an evening school program in which the students were able to earn a General Education Diploma (GED), a high-school graduation equivalent. The three other school projects which have received attention were in Chicago, Philadelphia and Baltimore, though there have been short-lived ventures in Boston, Fort Worth, Austin and elsewhere. The Chicago project was initiated by Tom Nicholas, supposedly motivated by Ephraim Stevens who went from Seattle to that city to spread the word. Miller Stevens obtained travel money from the Department of Health, Education and Welfare to visit Romani leaders around the country to tell them about Romani schools and to try to establish new ones; but his greatest success had been several years earlier, when he visited Washington in 1968 with Stanley Stevens, a Romani leader from Baltimore, Maryland. In Chicago, a grant of \$26,000 from state bilingual funds was initially provided for the 1973–1974 school year, during which time refinements were made to the program and a proposal drawn up for submission for further funds. It required, among other things, that:

- a) A Rom be named director and be given full authority in the selection of personnel;
- b) An equal number of Romani and non-Romani teachers be employed;

- c) No distinction be made in salaries received by the teachers, whatever their academic credentials;
- d) Equal time be given to the teaching of Romani language and culture by the Romani teachers, as to literacy and computational skills, taught by non-Romanies;
- e) All classes were to be held at night;
- f) Students of all ages were to be admitted equally;
- g) No attendance or enrollment records were to be kept;
- h) Students were not to be required to identify themselves;
- i) Classes were to be small, and acquisition of any skill was to be achieved by repetition;
- j) There was to be no formal discipline;
- k) Male and female students were to be seated separately, and females were never to be placed in competitive situations with males;
- l) Non-Romani teachers were to leave the room when sessions on Romani language and culture were taking place;
- m) The program was to admit the students regardless of their place of residence, and with no reference to the actual school district to which he or she belonged (Kearney, 1981, pp. 50–51).

The Chicago School District rejected the proposal, which was then picked up by the Northwest Education Cooperative which provided \$13,000 for a three-month pilot bilingual program. This was entitled *Gypsy Village Hindsight* and was located at the Halsted Urban Progress Center; it had 75 students to start with and eight teachers, half of whom were Romanies, and it seemed to be off to a good start. The evaluation at the end of this period was positive enough to obtain an extension of a further three months. The Chicago School Board was asked to sponsor a permanent school but, despite the success of the pilot, it declined. Other agencies approached by Nicholas, including the various urban colleges throughout the city and the University of Chicago, were not in a position to sponsor projects requiring bilingual funding. Different agencies such as the Small Business Administration, the Right to Read Program and the Division of Vocational Rehabilitation were all solicited, but none was willing to underwrite a Gypsy project. The school closed down.

In Philadelphia in 1970, Kalderash Romani leader Johnny Thompson got together with city officials to work out a compromise with them, because they had begun to withhold payments from those Romani families having children who were not attending school. A highly effective leader, Thompson was not only able to obtain a \$50,000 grant from the federal government to

establish a Gypsy school, but he was also able to persuade newly-arriving Romani families that, as the *forosko baro* (community leader) he would only help them find homes and establish businesses if they agreed to enroll their children in the program. He even went so far as to arrange for regular mini-bus transportation for the children to and from their homes. The school was located in the basement of St. Rita's Catholic Church at Broad and Rittner Streets. With the help of diocesan Cardinal Crowe, and later one Father Bevelacqua, classes for as many as 200 children lasted for more than ten years. All of the teachers were the nuns associated with the St. Rita's Convent, and their main focus was literacy skills and religious training. When Thompson died in 1982, no one was equipped to take over the work of this dynamic man, and the school closed down. Waning interest on the part of the government also ensured that here, as elsewhere, no particular effort would be made by the authorities to urge school attendance. The impetus of the sixties and seventies was a thing on the past. Today, Thompson's sister Barbara Nicola has plans to re-institute the school on the premises of her own church outside Atlantic City in New Jersey, but the problems of finding teachers and funding have yet to be overcome.

In August, 1968 in Baltimore, Miller Stevens met with Stanley Stevens after responding to a telephone call asking how a Gypsy school might be established on the East Coast. Together these two men visited a professor in the Department of Social Relations at Johns Hopkins University, and Maryland State Senator Joseph Tydings. Senator Tydings wrote to the Mayor of Baltimore strongly recommending that social services programs be established for Baltimore's Romani community; this in turn led to the Office of Economic Opportunity and the Baltimore City Community Action Agency organizing a joint discussion of the situation.

From this meeting it was determined that a survey of the Romani American population of Baltimore be undertaken, to assess needs and numbers. This was not successful. Most of the community refused to participate, and only members of Stevens' extended family seemed interested. It was decided nevertheless to proceed with a proposal to establish a school since the parents who were interviewed were unanimously supportive of such a program. This was put together in 1968, and it asked for \$14,300. Its requirements were that:

- a) One teacher having sufficient background in linguistic skills and with sympathy for cross – cultural problems be appointed to be an effective instructor and innovator;

- b) a female aide be selected from the Romani community to assist the teacher as an interpreter and control link;
- c) Space for a classroom be located within the Romani community and be provided by the Romani leadership;
- d) Educational materials and equipment be held in the custody of the teacher between classroom sessions.

The evident Romani/non-Romani imbalance of authority, the biased wording in parts of the proposal, and its one-family focus combined to assure that the project would not succeed.

### **Institutional resistance to Romanies and Romani culture**

Fear of Romanies in the classroom in America is mild compared to reactions in Europe; a British parent told a newspaper reporter that “[i]t came as a tremendous shock when we heard that Gypsy children were to be taught at the school. They smell, I’m afraid, and have the educational standard of retarded children” (Anon., 1965, p. 5), while in Italy, car tires were heaped in the middle of the road and set on fire to prevent Romani children from reaching the school; in Spain, local residents pelted Romani children who were attempting to attend school in Zaragoza with bricks (Anon., 1984, p. B7). In Hungary, at least in the mid-1980s, about 15% of Romani children are put into schools for the mentally-deficient (Satory, 1986, p. 5). Although the Western US schools for the most part received positive support initially from the surrounding non-Romani community, their establishment was not entirely free from elements of antigypsyism. In Seattle, for example, when non-Romani parents learned that there would be Gypsies in their schools, they became alarmed, and demanded meetings with the PTA. “In addition to the fear engendered by the prejudiced view of the Rom, there was also a feeling of resentment at having school territory impinged upon” (Kaldi, 1983, p. 21). Both Ephraim Miller and James Marks were angered by the lack of enthusiasm and concern they encountered from the establishment once the initial fascination with the Gypsy schools had passed. While other minorities continued to receive attention and financial support, the administration and the funding bodies simply lost interest (Tyner-Stastny, 1977, pp. 32–34; James and Marks, p.c.).

## Conclusions

We may trace the initial impetus for creating alternative schooling for Romanies in America to the mid and late 1960s, when it was stimulated by the general increase in interest in the civil rights of American ethnic minorities; and we may trace its decline to both internal and external factors—externally to declining available funds and (eventually) changing governmental policies towards minority support, and to general ignorance on the part of the establishment of who and what Romani Americans are. Internally, schools failed to maintain themselves because of fundamental cultural and social differences separating the worlds of the Romanies and the non-Romanies, and the lack of trained personnel within the Romani population to serve as administrators and educators. The Reagan administration (1981–1989) severely curtailed minority funding, blocking the Texas Proposal just weeks before it may have become a reality (Appendix, below); the Hopwood Decision which brought an end to affirmative action (1997) has further ensured that federal and municipal funds for parochial schools are out of reach.

Some classes have been created informally in different cities attached to the Charismatic Christian (“born again”) churches which have proliferated since the 1970s. While Romani community life is shrinking in terms of numbers because of changes in family structure and distribution, “Gypsy” churches are now providing locations in which Romanies still gather in considerable numbers, and on a regular basis. Indeed, this may be one overriding reason for their popularity. But such classes still lack trained teachers, or appropriate workbooks, or accreditation, and they tend to focus on literacy centered upon Bible stories in English, to the exclusion of anything else.

There is a thirst for education among young Romanies, but satisfying it means making it available in an accessible and attractive way. It must hold their attention, it must be compatible with everyday life outside of the classroom, and it must be reassuring to the older generation. Ideally this means an all-Romani environment, with trained teachers who are themselves Romanies, who can not only teach various subjects but oversee the behavior and wellbeing of the students. A start has been made in New York with the informal weekly classes organized and run by Gregory Kwiek, significantly a *themengo Rom*, i.e. from a European rather than American-born family. American Vlach Romanies came here following emancipation from slavery,

and have not experienced the Holocaust and other events in Europe which have politicized and educated European Romanies.

The New Wave Romanies are already bringing innovation with them, but the extent to which it will spread into the American Romani population remains to be seen. A greater sense of ethnic unity, bringing all Romani populations to an understanding and acceptance of shared origins and unity, is itself something which will have to be learned in the classroom.

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HRISTO KYUCHUKOV

## **Russian Roma children and their language development**

**Abstract:** The paper presents the results of research conducted among Russian Roma children. Two groups of children, 6–8 years and 8–10 years old, were tested with a Romani Language Assessment Test. The study was conducted in a Roma settlement of a small town not far from Moscow. The children were tested on different grammatical categories in Romani as their home language. The grammatical knowledge of the children about their home language is not considered to be used by the Russian teachers in classroom. The frame of Cummins (2015) “*teaching through an intercultural lens*” is taken as the starting point of the research. The research results showed that the Roma children at the age between 6–8 years know the most complex grammatical categories of Romani as their mother tongue, however children’s knowledge is not used by the teachers at school environment teaching Russian. There are no lessons in Romani as the mother tongue strengthening the children’s linguistic and cognitive abilities.

**Keywords:** Roma children, Romani, Russia, Romani Language Assessment Test

### **Introduction**

According to the European Roma Grassroot Organization’s (ERGO) Report (2000): “Roma children are not provided, from a very early age, with the same learning opportunities, as the vicious circles of poverty and discrimination act as powerful barriers in accessing education and training. Subsequently, they have lower attendance and completion rates, which in turn lead to poor labour market integration and social participation. Additionally, segregated education where Roma are over-represented is not only against EU values and principles, but also fuels inequalities and discrimination.” (p. 22)

The segregation of Roma children through education still exists in many European and non-European countries, among them Turkey and Russia. The children are very often subjected to psychological testing in their second language (L2, the official language of the country) and if they cannot correctly

answer the questions they are considered to be “mentally retarded” and/or suffering from “language deficits.” O. Garcia (2020) has researched the situation of bilingual Latinx children in the US, where issues are analogous to those of many Roma children, and using scientific methods has sought to answer the question: “Is it true that the bilingual Latinx children’s language deficit in their L2 influences the language knowledge of the children’s L1.” Frequently, the bilingualism of bilingual children, including Roma children, is not perceived as an asset but rather as a deficit – and the bilingual children are stigmatised for the rest of their life by means of all kinds of negative stigmas, which strengthen and reproduce the existing stereotypes in their societies. Only very rarely do the teachers and psychologists working with Roma bilingual children try to find out the real reasons for these children’s lower educational achievement at school, instead of blaming the parents, the community, and the children themselves. As the neurolinguist A. Costa (2017, p. 30) has noted: “The study of how the brain sustains higher-level cognitive abilities, or what we will refer to as cortical representations of cognitive functions (language is one of them), is extremely complex. The brain and the cognitive bases of language, memory, attention, emotion and so on, are difficult to study.” Although there is a lack of such studies, the teachers and the society in general continue to blame the children for their disadvantaged situation and their problems not only with L2, but also with their home language (L1) and culture and with developing solid literacy in both L1 and L2. This attitude is well expressed in a publication by a Czech psychologist: “Several studies in Central Europe have shown that Gypsies tend to score lower in IQ tests. This has frequently been explained as a results of a) environmental conditions in which the Gypsy families live, and b) language difficulties, because a number of Gypsies speak their own language and not that of the majority population. It is probable the environment in which the Gypsies live does not foster the development of intellectual abilities and social mobilities” (Bakalar, 2004, p. 291). As an effect, Bakalar suggests that the problem of Roma children is their mother tongue and the fact that they use their home language in everyday life. Like many other authors, this psychologist knows nothing about the structure of the Romani, and some linguists even maintain there is no such thing as the “Romani language”. Romani is the only Indo-European language spoken widely across Europe. It belongs to the new-Indian languages (related to Sanskrit, Hindi and Punjabi) and it developed through migration from northern India westward with influences of Armenian, Greek, Romanian and Slavic languages (Matras, 2002; Kyuchukov, 2003;

Oslo, 2018). Romani is a complex inflectional language. The noun system is divided into masculine and feminine, animate and inanimate, singular and plural forms, there are eight cases, a complex tense and aspectual system of the verb, and a syntax with different positioning of the verb in the sentence.

In a study of Bulgarian Roma students, V. Lambrev (2020) reported that, very often not only in the society but also in school, the Romani language is not valued as something positive. The teachers have also negative prejudicial attitudes towards the Romani. The speakers of Romani are more likely to be discriminated against than non-speakers of the language. Similar observations and findings have been discussed by Y. Matras, G. Howley and C. Jones (2020). The Roma children from Romania in the UK schools encounter the same attitudes because the teachers cannot make any distinction between the Romani and Romanian languages. For most of the teachers it is not clear what role as L1 Romani plays in the life and mental development – and general literacy development – of the children.

Yet, Cummins (2019) stresses: “[i]n a large number of contexts, schools also systematically and intentionally undermine the potential of immigrant-background and minoritized students to develop multilingual abilities. This undermining of multilingualism operates either by explicitly prohibiting students from using their home languages (L1) within the school or through ignoring the languages that students bring to school (benign neglect).” (p. 1). In contrast as an intercultural and more effective pedagogical approach, Cummins (2015) promotes the idea of “*teaching through a multilingual lens*” in the classroom “when the specific instructional focus is on developing students’ awareness of the language and affirming their linguistic identities. However, the same orientation can be referred to as *teaching through an intercultural lens* when the instructional focus is broadened to include students’ cultural knowledge in addition to linguistic knowledge. There is nothing radical about this approach – it simply takes seriously generally accepted pedagogical notions such as *teaching the whole child* and *connecting curriculum to students background knowledge*.” (p. 460).

I wish to take the points made by Cummins (2015, 2019) as integral to the applied theoretical framework, and I will try to show that the *awareness of the language* and *the linguistic identities* of the children are very important for the development of the *whole child*. The present study is based on testing the language knowledge of Roma children with the idea that this knowledge could be used at school for the purposes of effective intercultural education, as Cummins suggests. Building on this, teachers should also develop

a more ethnographic intercultural approach and “ethnographic imagination” (pp. 121, 138–39) in their classrooms and their own understanding of the background of their students, as suggested in Roberts et al. (2001).

Very often the poverty of Roma children and low socio-economic status of the families are associated with the lack of intelligence and knowledge of different grammatical categories. The teachers working with Roma children cannot accept that despite the economic situation and poverty the language acquired from early age in the family environment is the tool for development of cognitive skills of Roma children. Coming to school the children have rich language experiences and knowledge, have life experiences due the Roma culture, the experience which the majority children do not have. However, all these are underestimated or even undervalued by the teachers, majority society and institutions.

### **The study**

In recent years, academic interest in the education of Roma children has intensified. Nonetheless, publications dealing with the language issues faced by Roma children at school and properly testing the knowledge of Roma children *in their home language* are limited. The present study was conducted in a small town near Moscow at the beginning of the Covid-19 pandemic. Before the lockdown in 2020, I had to spend a week in a Roma community of Russian Kalderash and to live with a Roma family. The Roma families foresaw the danger from the coronavirus and two weeks prior to the state lockdown, in March 2020, they stopped children from attending the local school. Living with the family and using an *ethnographic approach* (Schieffelin, 1979) gave me the possibility to observe what the children do and how they communicate between themselves, with adults, and what kind of language games they use in the extended Roma families, as well as an ecology of social and cultural interaction where a few generations often live together.

My goal was to observe how much the children use the Romani language as the mother tongue and home language, and how much they know about the grammatical categories of Romani. Very often, in order to gain their trust, I became involved in different kinds of language games with the children, asking what objects are called in their Romani dialect.

The research questions which I want to answer this study are:

- How do the cultural events and the family life in traditional Romani environment of the Roma children facilitate the acquisition of Romani?

- Which Romani grammatical categories are most difficult for the children to acquire after the age of 6 years?

In order to check their knowledge of Romani grammatical categories, I used the ROMLAT Test in Romani (Kyuchukov & de Villiers, 2014). The test is a demanding assessment that looks at knowledge in both comprehension and production, and contains subtests on the following Romani grammatical categories:

- |                           |               |
|---------------------------|---------------|
| – Wh – questions          | comprehension |
| – Wh – complements        | comprehension |
| – Passive verbs           | comprehension |
| – Sentence repetition     | production    |
| – Possessives             | production    |
| – Tense                   | production    |
| – Aspect                  | comprehension |
| – Fast-mapping nouns      | comprehension |
| – Fast-mapping adjectives | comprehension |

Two groups of children were tested with the picture tests in their home environment:

- 6–8 years old – N=9 children
- 8–10 years old – N=10 children

## Results

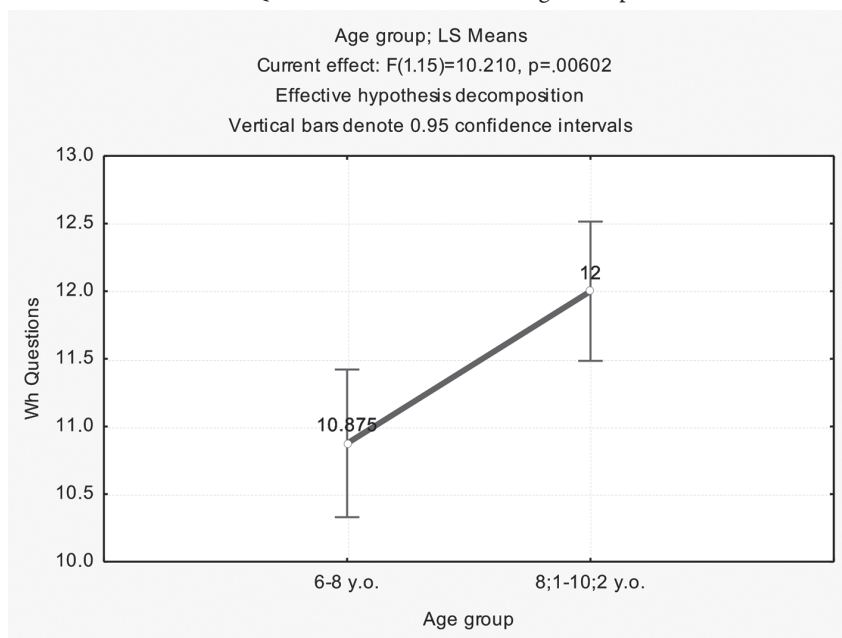
In their everyday life, the children use Romani as L1 intensively for communication with parents, relatives and neighbours. However, the children also very often switch to their L2 Russian, although there are no native Russian speakers around and in close contact with them. It is quite normal for the close family relatives to gather in the evening to cook together, to eat and drink, to sing and dance, and to tell stories. The Roma children grow up in a community where this kind of rich oral history exists and is passed on.

However, I also tested the knowledge of the children with the Romani Language Assessment Test in order to find out how much the children cognitively understand and orally produce the grammatical categories.

Here are the findings from the testing. Figure 1 presents the results from the Wh-test. There were two types of wh-tests: multiple wh-questions and wh-complements. These tests measure the ability of the children to answer questions with two or three *wh*-words at the beginning of the sentence. For example: *Who, what eats?* (*Kon, so xal?*) or *Who, from whom, what stolen?*

(*Kon, kastar, so čhordas*). The second test was with a long distance wh-word (the wh-complements test). For example: *The mother asks the child to bring a bowl, but instead the child brought a glass. What did the mother say for the child to bring? (I dej vakerdas e šavske te anel baro čharo, aj ov antas baro poxari. So vakerdas I dej e šaveske so te anel?)*. These kinds of sentences do not sound grammatically correct in many languages, including English, but in Romani they sound quite normal, and it is normal to have exactly this structure.

Figure 1. Test Scores on Wh-Questions as a Function of Age Group

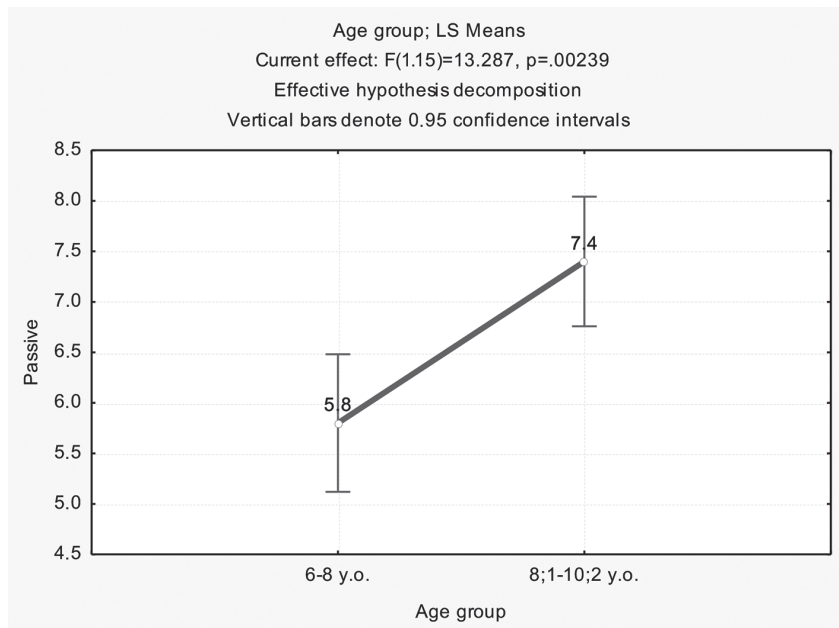


It is clear from Figure 1 that the older children answer these types of questions more correctly than the younger children. The statistical differences between the groups are significant  $F(1,15) = 10.210; p = .00602$ . In the performance of the wh-complement questions, all children from both groups had the same results. All of them answered correctly the questions. This shows that the children know correctly which *what* question to answer in the sentences where there are two question words (*What...what...*). Figure 2 shows the results from the passive verbs test. The children were shown pictures with multiple choice and asked to respond by pointing to an image: *The*



dog was kicked by the horse. Show me the right picture. (*O grast čhalavdas e džukles. Sikav mange kaj si akava*). The results of the groups are given in Figure 2.

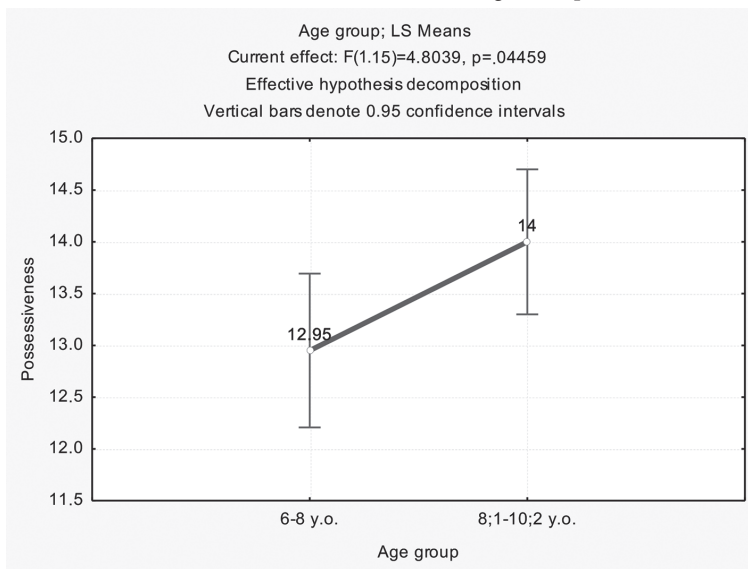
Figure 2. Test Scores on the Passive Test as a Function of Age Group



Again the older group of children had better results. The differences between the groups are statistically significant  $F(1,15) = 13.287$ ,  $p = .00239$ . The children understand the active verbs in a sentence such as *The horse kicks the dog* much better. Then it is clear who kicks whom. But the use of the passive verb *was kicked* in the sentence is not as clear who did the action and who was affected as the target of the action. The older children understand these actions better.

Figure 3 presents the production of the forms for possessives in Romani. The possessive is expressed by a suffix or case ending, and in Romani this is a genitive and it depends on the gender of the subject, for example: *The balloon of the horse* (both subject and object are masculine) (*E grastesko balono*), *The flower of the cow* (both subject and object are feminine) (*E guruvnjaki lulugi*). The children's results are presented in Figure 3.

Figure 3. Test Scores on Possessive Test as a Function of Age Group

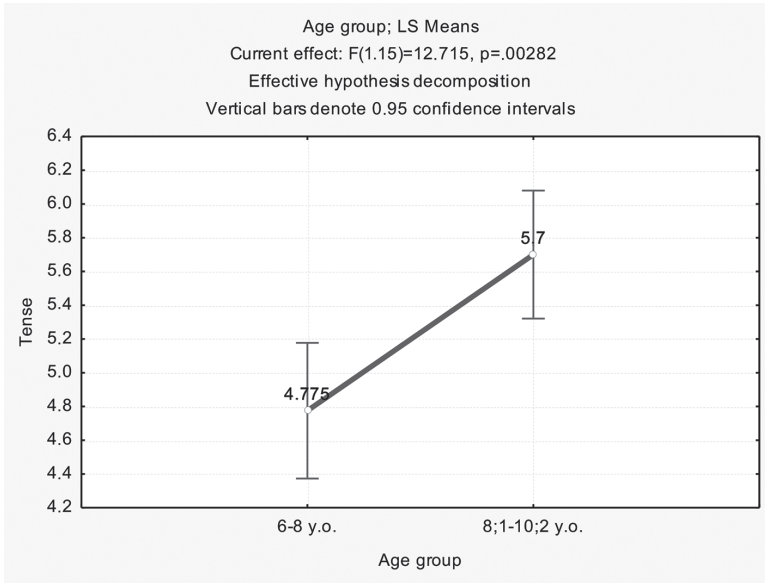


Once again the older children perform this test better than the younger children. The statistical differences are significant  $F(1.15) = 4.8039$ ,  $p = .04459$ . This is one of the children's favourite tests because in this test, I have introduced novel, made-up subjects and objects which do not exist in reality but are made-up, such as *Boko*, *Kiki*, *cita*, *tromo*, etc., and which test the ability of the children to transfer grammatical knowledge from known familiar subjects and objects to unknown ones.

The next test involved the level of knowledge of tenses in Romani. The results are given in Figure 4.

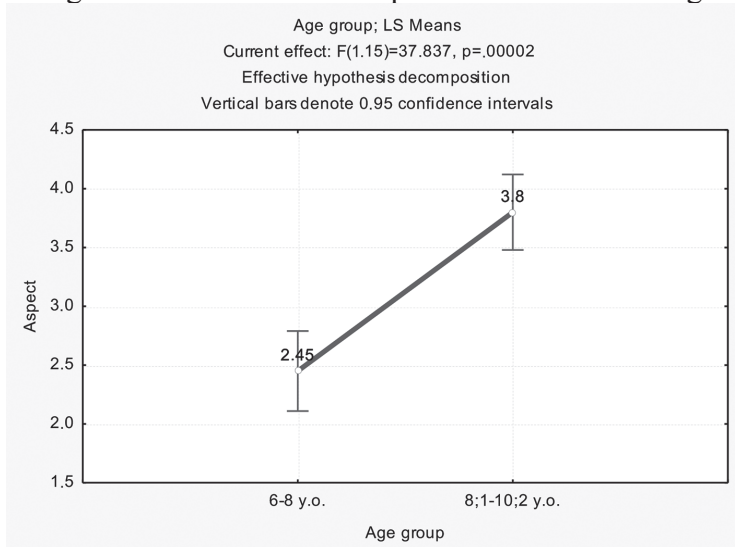
The differences in performance in the tense test between the age groups are statistically different  $F(1.15) = 12,1715$ ,  $p = .00282$ . The children's knowledge about three tenses in Romani was tested: the present, past and future tense (marked by infinitive). The children were given made-up verbs which do not exist in Romani and the children had to use these novel verbs in the three tenses, applying their existing knowledge of tense and its conjugation. For example, the children were given the verb *bodinel*, which does not exist in Romani. The researcher says: *Akaja šej džanel te bodinel. Akana oj bodnel. Raki so kerdas i šej...(bodingas/bodingjas)* (This girl knows how to <NOVEL VERB>. Now she is <NOVEL VERB>. Last night she was ..... The test requires the testee child to use the <NOVEL VERB> in the correct tense).

Figure 4. Test Scores on Tense as a Function of Age Group



Together with tenses the children also acquire the aspectuality of the Romani verb. The results from the aspect test are presented in Figure 5.

Figure 5. Test Scores on Aspect as a Function of Age Group

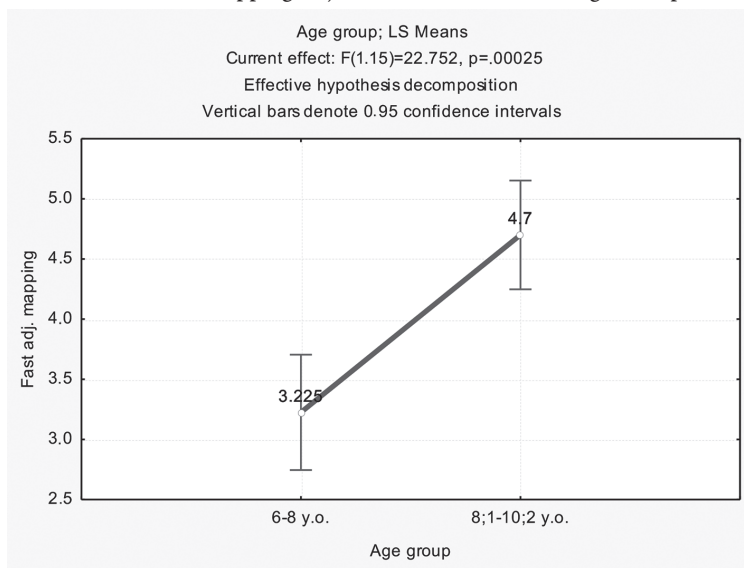


The results show that the older children are much better in the acquisition of the aspectuality of Romani verbs. The differences between the two groups of children are statistically significant  $F(1,15) = 37,837, p = .00002$ . The children were given novel verbs which do not exist in Romani and once they were given the ongoing novel action, the child had to predict the completed novel action. The ongoing and completed actions switched places with the next novel verb. For example, the children were given the verb *bodinel* which does not exist in Romani. The researcher says: *Sar o dad vakerelas po telefono o shavo KAKUNDAS <NOVEL VERB> po krano*. While the dad was speaking on the phone the boy KAKUNDAS <NOVEL VERB> on the crane (completed). *Sar o dad vakerelas po telefono o shavo .....KAKUNELAS* (expected to be said by the child). While the dad was speaking on the phone the boy .....KAKUNELAS (expected to be said by the child) on the crane (uncompleted). So the older children perform this task much better than younger children and it is a task which is complicated for them.

The next test is a fast-mapping noun test, where the children are shown objects of the same colour, but among them there is one with an unknown shape. The object with the unknown shape is given a name in Romani, which is a made-up novel word, not a term existing in Romani. The children could easily identify the object listening to the unknown name, a word they had never heard before. This task was very easy for the children and both groups performed 100% correctly in this task. However, the younger children had some difficulties in performing the next test, involving fast-mapping adjectives. The results of this test are shown in Figure 6.

As can be seen in performance in this test, again the differences between the groups are statistically significant  $G(1,15) = 22,752, p = .00025$ . This test was a bit more complicated. It was a multiple choice test and some of the objects were in invented colours and the names of the colors were also made-up. The children were given the name of the color and among three objects, there were two with the same made-up colour. Usually one of the objects is masculine and the other is feminine, and the child has to pay attention to the researcher to note if he is using a masculine or feminine ending. For example, the tester says: *This color is patrevali <NOVEL ADJECTIVE>. Show me where the patravalo (m.)..... or patravali (f.)... is*. The child has to pay attention not only to the new made-up novel word but also to the gender ending *o* or *i* in Romani in order to make the correct choice. The older children performed better in this test.

Figure 6. Test Scores on Fast-Mapping Adjectives as a Function of Age Group



The rich social life in the community and all activities in the everyday family and community life in which the children are involved, from early age help them to learn the Romani grammar. However, not all the grammatical categories are acquired till the age of 5 years as it often is written in the developmental psychology textbooks. In some languages some categories are learned later. In the present study the most difficult categories for the children were passive verbs, tense and aspect of the verbs, and the fast-mapping adjective. They are difficult for the children because of the grammatical structure of the Romani language. The lack of knowledge on the side of teachers and school psychologists on the structure of the Romani language as a system and their inability to explain why the Roma children have some difficulties with some grammatical categories learning their L2, is very often the reason to blame the children for their alleged mental retardation.

## Discussion and conclusions

Many years ago, at a psychology conference in Slovakia, I presented the results of a study with 6 years old Roma children from Slovakia and Bulgaria. (Kyuchukov, 2009) The children in both countries were involved in prepa-

ratory classes to learn the official language of the country before entering primary school. The study also comprised Slovak and Bulgarian native children. I was researching the use of six verbs in Present, Past and Future Tense in Romani and in the official languages of the two countries – Bulgarian and Slovak. The Roma children from both countries did not know how to conjugate 3 out of 6 verbs neither in Romani nor in the official languages of the countries. The same 3 verbs were difficult for Roma children from both countries. However, these verbs were not difficult for the Bulgarian and Slovak native children. When I asked the audience about their opinion why the 3 verbs were difficult for Roma children and not difficult for Bulgarian and Slovak children, one of the psychologists answered directly “because the Roma children are mentally retarded”. My answer to that psychologist was “No!”. I tried to explain to her that not all children learn all grammatical categories at the same time and some verbs and their conjugation in some languages are acquired after the age 12 or even after 14.

The study here, although with a limited number of participants, shows that by the age of 6, most Roma children already know most of the grammatical categories and use them correctly in their communication. However, there are grammatical categories which are learned later, after the age of 6. In the study here these categories involve comprehension of passive verbs, production of the tenses in Romani, comprehension of the aspect and comprehension of the novelty adjectives. If the Roma children had the possibility to study their language organized at school systematically, as Vygotsky (1962) claimed that all languages should be learned in an organized way and systematically with good methodology and teaching materials, then this can guarantee normal development of the language after the age of 5–6 years. Unfortunately, contemporary schools, not only in Russia but also in other European countries, do not consider teaching Romani as the mother tongue although there is a Recommendation of the Council of Europe that the member states should teach Romani to children between the age of 3 to 18 years.

Putting the research findings in the frame of Cummins (2015) “*teaching through an intercultural lens*” and including the student’s cultural and linguistic knowledge in the educational process will change the attitudes of the teachers, students and the society, towards Roma children education and their language.

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WILLIAM S. NEW

## **Horváth & Kiss v. Hungary: How Romani children became mentally retarded**

**Abstract:** In 2013, the European Court of Human Rights decided the case of *Horváth and Kiss v. Hungary* in favor of the two Romani boys who alleged that they had been misdiagnosed as ‘mildly mentally retarded’ and consequently placed and retained in a special school for their whole primary education. This, they claimed, deprived them of the educational opportunity to pursue their chosen vocational interests. In this research note, I will provide a brief view of the history of special education in Hungary, and the history of mental retardation in its medico/pedagogic connections. I will suggest that the Court’s decision, while a positive development, fails to address the fundamental systemic racism of the entire medico/educational system in Hungary, and that until that more radical change is undertaken, a disproportionate number of Romani children will continue to be officially and unofficially treated as mentally deficient.

**Keyword:** children, Hungary, mentally retarded, Romani

\* \* \*

That Romani students continue to be systematically devalued and underserved by public schools across Europe is not in question. This fact has become for Europe and the EU, as civilized and civilizing entities, the latest historical manifestation of the perennial ‘Gypsy problem.’ In communist Europe of the 1960s, the problem – from the point of view of the powers that be – was not so different. Here was an unassimilated minority not enjoying the kind of social equality and prosperity on which the socialist State had waged its fortunes. In neoliberal Europe of the 2020s, the very same systemic racism pervades public institutions, and some kind of positive response is called for. The educational problems of Romani students has been addressed, among other ways, through a legal campaign – aimed at the European Court of Human Rights (ECtHR) in Strasbourg – that seeks to persuade mostly post-communist nations to desegregate their schools, to make space for Romani students in the mainstream. The current segregation problem was pro-

duced in large part through the failed attempt to solve the ‘Gypsy problem’ of the early 1960s, when the twinned goals of industrial growth expansion of compulsory schooling encountered a large Romani population that didn’t take up, and was not permitted to take up, the offer of total assimilation. The result was that Romani children were put in schools, but not into normal mainstream schools, but into either segregated ‘ghetto’ schools or segregated special schools for the mentally defective (McCagg, 1991; Majtényi and Majtényi, 2016; Eliason, 2016).

In this note, we will look at the most recent major ECtHR Romani education case – *Horváth & Kiss v. Hungary* (2013) – decided in appearance in favor of the two plaintiffs, Romani boys who were diagnosed as mentally retarded and placed and retained in a special school until their teen years, after which their life chances were severely limited. These two young men are representative of a large, international class of Romani children who have been placed on dubious grounds in special schools for the mentally handicapped over the past fifty years. Our limited purpose here will be to detail the grounds of the complaint, and the response of the Hungarian state to this complaint, focusing on the medico-pedagogic classification of ‘mental retardation’ (intellectual or cognitive disability, oligophrenia, backwardness, feeble-mindedness, idiocy, subnormality, et al.). To better understand what it means to have been classified as mentally retarded in Nyergihyáza, in eastern Hungary, in 2000 we need to learn something about the historical development of Hungarian special education, working backward from the articulation of the current framework in the 1970s.

One purpose of this historical expedition will be to suggest that the remedies proposed by the Court, or by other European entities with like missions, are not sufficient to address the deep institutionalization of racial animus against Roma in schools. My contention is that nothing the Court has decided fundamentally changes the underlying logic of the system by which Romani children are presumed inferior, of diminished value, and treated as such. It is important to keep in mind that this conclusion does not mean to pick out countries like Hungary – as easy target with its current antidemocratic leadership – as exceptional, that is, as somehow less civilized than European nations with longer traditions of at least pretending to be democratic. Rather, it is the clear example of permanent systemic racism in education (and elsewhere) provided by leaders of the EU, and the United States, that make it easier to see what’s going on in places like Hungary.

## The background of the case

In *Horváth and Kiss v. Hungary* (2013), The ECtHR upheld the boys' complaint, ruling that schools and school officials has discriminated against them on the basis of their Roma ethnicity, violating Article 14 (which prohibits discrimination generally), and Protocol 1, Article 2 (which specify the right to education) of the European Convention on Human Rights (Barnes, 2017). This case focuses on the detail of the diagnostic processes by which these two boys – both seven years old at the time of their first examinations in 2001 and 2000 respectively – were determined by school authorities to be mentally retarded and in need of placement in remedial (special) school settings. They were tested on numerous measures over the course of the next five years, and a complaint against the Expert Panel responsible for the diagnosis, alleging unequal treatment, was filed on their behalf in the county court in 2006. It was another seven years before the case was decided, by which time both boys had left school.

András Horváth and István Kiss do not exactly appear 'in person' in this text, but rather they alternate between being represented as artifacts of their official records and as holders of rights to education. Their first names are never mentioned and they are always referred to as 'young men,' when in fact they were at the time this case was originally filed 11 and 13 respectively, and the violation of their right to education that this judgment acknowledges occurred first when they were each seven years old. That is, when they were officially deemed 'mentally disabled' and placed in a special school for the handicapped. The only personal information shared in the report is that András wanted to be a dance teacher, like his father, and that István wanted to be an auto mechanic. Neither was able to pursue those vocations because they were not permitted to attend the secondary school where the requisite skills might have been learned. This deprivation – which did not enter into the actual legal arguments – was offered rhetorically at the outset to illustrate the damage done by their placement in the special school. The document omits mention of the fact that only a small minority of Romani students generally, including who are not placed in special classes, manage to complete a secondary program leading to skilled employment.

In 2001, when he was six or seven, Mr. Horváth was referred by his pre-school teachers and administration to an 'Expert Panel' on the observation that 'his mental and social abilities were lower than normal for his age,' and

reasonable suspicion that he was mentally disabled. The 'Expert Panel' – on the bases of three 'intelligence' tests that delivered disparate results – determined that he was more than two years behind his normal peers academically, and classified him as having 'mild mental disability.' They suggested that his central nervous system was immature, but offered no further organic basis for his disability. This diagnosis triggered placement in the Göllesz Viktor Remedial Primary and Vocational School, where he remained until at least 2008. Over that period, he was tested several times, and although his school performance and attendance were good, and teachers said that his borderline IQ score (of 71) underestimated his abilities, the Expert Panel chose not to alter either his diagnosis of 'mild mental disability' or his placement in the remedial school.

In 1999, during his first year in the regular primary school located in the Romani settlement in Nyíregyháza, Mr. Kiss (age seven) was placed in a special program within the school, due to 'learning difficulties deriving from his disadvantaged social and cultural background.' The following winter he appeared before the Expert Panel, who diagnosed him also with 'mild mental disability' on the basis of two IQ tests – the Budapest Binet Test, a mostly verbal measure, and Raven's Progressive Matrices, a visual measure: there was considerable discrepancy between his scores on these two measures, yielding an average of 73. His parents objected to his removal from the regular primary school and his placement in the Göllesz Viktor Remedial Primary and Vocational School, to no avail, and were not afforded their legal option to appeal the decision. István was a model student at the special school, won several awards, and subsequent IQ tests conducted by independent experts found his abilities to be in the normal range. The official school authorities disagreed and he remained in the special school and then was referred to the special track in the secondary school, where he was not able to pursue study of auto mechanics. The Court's narrative of the boys' school histories ended in 2008, after charges of discrimination were filed on their behalf in 2006 by Lilla Farkas, in conjunction with the Chance for Children Foundation and the European Roma Rights Center.

The case began at the local level, and proceeded on appeal up to Hungarian Supreme Court, who referred it to the European Court of Human Rights. As Farkas notes, it was the express purpose of bringing this case to extend the ruling in *DH and others v. CZ* to address issues of discrimination left unresolved in that case, particularly questions related to intelligence testing itself, and its use in the disproportionate diagnosis of Romani children as mentally disabled, leading to placement in special schools.

## **Diagnosing mental retardation/ deficiency**

The goal of the boys' lawyers was to prove discrimination by showing that they were treated 'differently, without an objective and reasonable justification, [than other] persons in relevantly similar situations.' The other persons would be young Roma and non-Roma children who might have been referred by their teachers and other professionals for evaluation, because they were not making adequate progress in school, or in pre-school. The Roma boys, and comparable non-Roma children for that matter, were already in segregated environments in their own neighborhood schools before they were transferred to special schools. The lawyers asserted (p. 23) that the special education system in place did in fact 'uniquely burden' their clients, in at least three ways. First, they claimed (p. 32) that the Expert Panel – an interdisciplinary medical/pedagogical team under the supervision of the County council who administered the prescribed tests – did not properly inform the parents of the process, or obtain their consent for the eventual diagnoses and placements. Second, they notes that the Public Education Law (PEA) continued to permit the Expert Panel to use the concept of 'familial disability,' which in effect rendered being poor and being Roma a de facto disability, and was therefore discriminatory. Finally, the attorneys for Horváth and Kiss referenced a revision to the PEA that disallowed placing children with learning or other psychological difficulties, but without evidence of mental deficiency from 'organic' causes, in special schools, and claimed that the test results did not provide that evidence, and in any case barely met, or did not meet, minimal criteria for mental retardation. While there was a great deal of discussion of the validity and bias of the testing materials themselves, counsel did not formally make any formal claim that they were in themselves discriminatory.

Lawyers for the Hungarian government denied that these Roma children had been treated less favorably than non-Roma children in the same situation, and that while their educational treatment had turned out to be different than some non-Roma and some Roma children, there was good justification for this difference. The boys were shown to be mentally deficient, with special needs that could not be met in the regular school. By way of answering both the claims that the family disability concept was useful and valid, and that there was nothing objectionable about the testing, the Government asserted (p. 25):

that tests and standards tailored to the Roma population would have no sensible meaning from the point of view of assessing a child's ability to cope with the mainstream education system – which was the purpose of the assessment of learning abilities of children and of the psychometric tests applied in the process ... The Government claimed that socio-cultural background had been decisive for the mental development of the child, and when the actual level of a child's mental development (IQ) had been measured, the result had necessarily been influenced by the same socio-cultural effects that had shaped the child's mental development.

With respect to the argument that this placement was inappropriate because the Expert Panel had not found any evidence of the organic basis of mental deficiency that was supposed to be a condition of placement into this school, the government pointed to a new provision to the PEA allowing the placement of learning disabled children in the special school if they were provided with an appropriate developmental plan, which they said that the Expert Panel had provided. They denied that the Expert Panel had even diagnosed Horváth and Kiss as 'mentally retarded', the question of misdiagnosis was moot.

The Court ruled in the boys' favor only in regard to the failure of the Expert Panel to provide due process to the parents of the children, which resulted in a placement that deprived the boys of their educational rights, that is, prevented them from pursuing the kinds of vocations they wished to pursue. They added that the government was responsible for taking special care in decisions about Roma education because of their historical record of vulnerability to unequal treatment. The government failed in this regard also. While the Court raised questions about the fairness of the testing, and about the discrepancies between the criteria used by the Expert Panel in determining mental retardation and the criteria recommended by the World Health Organization, it declined to rule on whether these arrangements violated the Convention on Human Rights. As is typical in such cases, the Court gives wide deference to States to determine how to educate and medically treat their students, leaving it to the schools to decide – in almost every case – which differences in treatment are justified and which are not.

## **Institutional foundations of segregation on the basis of mental deficiency**

It might seem that the circular argument employed by the State to justify their policies could never be refuted, without fundamentally uprooting some of its major premises, which are grounded in the institutional practices and logics that the Court is reluctant to address. I would contend that this is the main source of the weakness of a strategy for improving the lives of Romani children and families primarily through legal challenges. The law, particularly the European law as it is currently constituted, lacks the power to challenge the social and political practices underlying schooling (and the associated medical, 'scientific' institutions) at the level at which they would need to be challenged, if an equal education for Roma children was an issue really on the table. The Court can't change what many/most Hungarian authorities think about Roma, it can't change how mental retardation has been 'weaponized' (to use the current jargon) in the service of eugenic (racial) reasoning, and it can't change the deeply-held convictions about homogeneous grouping (non-integration) on which almost all European school systems are constructed.

There is nothing unique about Hungary in this regard: it has its unique history and socio-political formation, but the general outlook on full-throated cultural integration there is not significantly different than what one finds in Paris, London, Berlin, or Chicago. In the remainder of this note, I would like to sketch some of the particularities of the official Hungarian perspective, with respect to the two main issues raised (but not actually ruled upon) in this case: the concept of family disability, and the meaning of mental retardation (and its many discredited synonyms). To this end, I will review a series of reports published in 1982–83 by a group of physicians, scientific researchers, and experts in education under the aegis of the National Institute of Hygiene in Budapest [citation]. These reports summarize the concept of family disability, in the context of the history of special education as it has applied to the Roma in the communist period. The results of their study are cited in the Court papers, but not described in detail. Much more could be said about the history of this perspective and related policies and practices – looking back to the continuing influence of *Heilpädagogik* in Hungary, first felt at the turn of the 20<sup>th</sup> century; the uncomfortable history of eugenics in Hungary, culminating in the mimicking, and cooperation with, the Nazi genocide; and

the domination of the Russian science of abnormality, termed *defektology*, starting in the 1950s. But that will need to wait for another occasion.

### **Family disability and criteria for mental retardation (1970s)**

In the early 1980s, an interdisciplinary group of scientists, doctors, and educators from Budapest published three papers delineating the situation with regard to mental retardation in Hungary (Cziezel, 1980; Szondi and Sentágothai, 1981; Lanyi-Engelmayer, Katona and Cziezel, 1983). These publications also detailed a large-scale study of diagnoses of mental retardation from 1971, which gives a dramatic sense of the role of 'family disability' in the diagnosis of mental retardation in children, and in their placement in special schools. This was a period in which the education and literacy of Roma children was perceived, as it was forty years later, to be a social and political problem of some urgency: while many more Roma children were in school in the 1970s than had ever been the case, most did not progress beyond elementary school, and upwards of 30% of Roma children were classified as mentally deficient. Most of these children were placed in some kind of special school or special 'Gypsy' class (Crow, 1991). Much of this 'mental deficiency' seemed to derive from a lack of knowledge of the Hungarian language, and from poor school attendance.

'Mental retardation' was used at the time interchangeably with mental deficiency, oligophrenia, mental insufficiency, mental subnormality to refer to this class of children who were eventually referred for some kind of care or treatment. There were four categories of mental deficiency – mild, moderate, severe, and profound – with the only a small percentage of cases assigned to the first three categories: perhaps .3 % of the total 3.3% of the total population designated as mentally deficient as this time. The mild mental retardation – the category into which Horváth and Kiss were placed – corresponds to IQ scores between 50 and 70, though policies in the late 1990s when they appeared before the Expert Panel permitted a diagnosis when IQ scores were somewhat above the threshold of 70, as was the case for both boys on several measures of intelligence.

There are three main criteria for mental retardation: (1) social incompetency, (2) significantly low IQ, (3) and disturbance in mental development. The social criterion is determined (diagnosed) by parents and teachers, however, sometimes it is confirmed with the help of special



tests (e.g., Vineland). At school-age the social incompetency is manifested as educational retardation or incompatibility. Later, lack of social competence and/or lack of self-sufficiency are the most important (Lanyi-Engelmayer, Katona and Cziezel, 1983, p. 125).

The authors go on to define the two etiologies from which mental deficiency develops: a pathological, anomalous category characterized by presence of genetic, physiologic, of somatic abnormalities, and a familial-cultural source which is not based on either evidence of organic abnormalities or family histories of genetic or other organic disorders.

The latter variety of mental deficiency – corresponding to the diagnostic criteria of 'social incompetency' – is 'determined (diagnosed) by parents and teachers, however, sometimes it is confirmed with the help of special tests ... At school-age the social incompetency is manifested as educational retardation or incompatibility. Later, lack of social competence and/or lack of self-sufficiency are the most important' (p. 126). Traditionally, and in the case of these professionals in the 1980s, it was the understanding and treatment of those children in the first category – usually with the more severe problems – that was of primary interests to the medical/psychiatric field, and this class of mentally retarded individuals was at the time shrinking, due to medical advances and public health measures (Tusnadys, 1980; Szondi and Sentágothai, 1981).

Important to note here – and this practice has not changed in the succeeding four decades – is the fact that mental retardation as social incompetency, not fitting in, is defined almost exclusively as behavior within the school setting, where teachers (and in practice, somewhat less frequently) parents are responsible for the first referral. The medical (psychiatric) and psychological (psychometric) participants in the process of diagnosis join with the purpose of confirmation, or disconfirmation, of this initial diagnosis. While some of the tests employed in making their determination tap 'daily living skills', most of the tests (like the Binet and Wechsler tests) are highly correlated with school performance, and with the schooling histories of parents. This produces, of course, a situation of self-fulfilling prophecy. Children are selected out by teachers and counselors for not exhibiting conventional, age-appropriate (indexed to 'normal' non-Roma children) behaviors and academic performance, and the tests confirm the teacher's observations, but add the psychiatric designation of mental retardation, which enables removal from integrated regular classroom setting to a segregated remedial setting.

Lanyi-Engelmayer, Katona and Cziezel (1983) note special schools in the Hungarian tradition are not typically inclined toward the goals of integration. Rather, special education in Hungary 'regards optimal developmental programs for disabled persons as those most greatly stressing *orthopedagogical* goals.' The practice and theory of *orthopedagogics* emphasized the problems of particular children in achieving adulthood, and in cooperating with adults. While often dressed up in the language of phenomenology (as in the example quoted below, from the same time period), this was basically a behavioral, correctional – as opposed to curricular – approach to (remedial) education, where adults seek to recognize 'his problem' and to correct it.

In a problematic educative situation there are noticeable moments of aggravation in the relationship between child and adult that have to be dealt with adequately. ... That a particular child's becoming adult does not occur as it should usually is noticeable because on the basis of particular behaviors he becomes conspicuous, especially in the sense that they are not in accord with what can be expected of him in everyday interactions. Being rebellious, telling falsehoods, neglecting obligations, manifesting learning and/or behavior problems indeed make a child conspicuous. These symptoms are nothing more than an indication of a gap between his achieved level of becoming adult and his presently achievable level. Also, this is a summons to the adults to now engage in "special" intervention with him and to help him with "his problem"... Thus, for example, Adam did not ask Eve what problematic educating is but what now has to be done with Cain (Niekerk, 1979, p. 23).

Indeed, what now has to be done with Cain! Lanyi-Engelmayer, Katona and Cziezel (1983, p. 125) go on to suggest that the placement of so many children into special schools on the basis of social incompetency – where there is no evidence of organic injury or defect – and the lack of integration between the goals of normal and special education is due 'the achievement-oriented, pedagogically intolerant atmosphere of ordinary public schools, crowded classes, and limited possibilities of individual teaching.'

In 1971, Cziezel et al. (1980) carried out the first large-scale etiological study of mental retardation in children in Hungary. The study was comprised of many evaluative components: anthropometric, psychometric, medical, psychiatric, pedagogical, and socio-demographic. This multi-disciplinary approach to mental retardation, where the underlying condition is defined as medical/psychiatric and the treatment as predominantly educational, bears witness to the heritage of Hungarian special education in *Heilpädagogik*, which origi-

nated in Germany in the late 19<sup>th</sup> century, as well to the influence of Russian *Defektology* during the communist period. In both cases, the subordination of education to psychiatry should be noted, as well as extent to which psychiatric power is grounded in the law. This, of course, is clear in the case Horváth and Kiss, who are legally 'confined' in the special school, constrained from entering the regular school, on the basis of the legal authority of Expert Panel. The study in 1971 revealed the extent to which the 'social competency' criteria of mental retardation, associated with an etiology of family-cultural disability, had come to dominate the diagnostics of mental deficiency in Hungary.

Only 31% of the 1364 children examined were diagnosed with 'pathological' mental retardation, while 49% were diagnosed with 'familial-cultural' causes, and another 19% with no known cause, or no diagnosis of mental retardation at all. There is no mention of Roma, specifically, in the discussion of familial-cultural disability, but it is certain from the historical context (Matenji & Matenji, 2016) that Roma children must have constituted a large portion of this category. It's worth going into some detail about the operation logic of the diagnostic category, because it give some sense of how not fitting into school is brought into contact with biopolitical factors like reproductive practices (Pickette, 2015). The authors (p. 124) begin by asserting that 'genetic (polygenic) and environmental influences play interrelated roles in the development of intelligence in general and as causal agents of familial-cultural mental retardation.' The children in this category were found to be approximately 12 times as likely to have siblings and parents who were also mentally retarded as in a 'control' population. Again, while there is no specification of anyone's ethnicity in this study, we must assume that Roma children were overrepresented in 'retarded' group and underrepresented in the 'normal' group, an inference also supported by low SES and low vocational levels of the mentally deficient families.

One might have asked whether this is just a function of socio-economic deprivation, that is, whether mental retardation is an environmental rather than some kind of endogenous, familial-as-genetically-related, consanguinity effect. But the authors point to data related to 'fertility' and reproduction. 'The number of children in families with mild familial-cultural retardation was more than twice the average in the general population ... This high fertility rate, probably due to ignorance of birth control methods, may have contributed to the high prevalence of retarded people and the relatively frequent occurrence of retarded parents in this category' (Cziezel, 1980, p. 127). The 'fertility' of Roma women, their reproductive behavior, and the birth-weight

of their children, had been (and continues to be) a preoccupation of Hungarian public health authorities for many years, and many *orthopedagogical* interventions were attempted, including various forms of coerced sterilization (See Szénássy, 2017, for example). These speculation with respect to family 'degeneracy' are consistent and continuous with the rationalizations of eugenic science that prevailed in Hungary, and other states under the Nazi sway, during the fascist period (Varsa, 2017). But it's also important to recall that this perspective about mental retardation and the marginalized, racial minority communities who were overrepresented in the pool of those diagnosed as mentally retarded and placed in special schools, was common across Europe and the United States at the time (Sarason and Doris, 1979; Clarke and Clarke, 1974). It was 'normal' science and normal social policy. This research from Hungary was presented in 1973 at the *International association for the scientific studies of mental deficiency*, then and still, with 'intellectual disability' having replaced 'mental deficiency', the major scientific organization devoted to the subject.

## **Conclusions**

The inclusion of concept of family disability (with its undisguised relation to the 'Gypsy problem') in the criteria for the psychiatric diagnosis of mental retardation remained part of the Public Education Law in Hungary into the 21st century. The system of special schools was likewise little changed from it's initial expansion and rationalization in the 1960s and 1970s. It's important to note that the population identified in Hungary (and other countries) as Roma is tremendously diverse, and that while for some segments of this population there has been an increase in educational opportunities and integration over the past fifty years, for other segments – those found in the poor rural and urban settlements across the country – things are not much improved. The 'Decade of Roma Inclusion' that concluded in 2015 did not deliver the promised inclusion, and the hard rightward, nativist turn of the government of Hungary has supported overt anti-Roma sentiment, action, and policy. But the more obscure point I would like to emphasize is that it is the official, scientific, legal definition of the category of mental retardation – and the way that this definition determines placement in a particular set of medico-educational institutions – that undermines the possibilities for overcoming the kind of non-inclusion litigated in *Horváth & Kiss v. Hungary*. Like the other ECtHR cases decided in favor of Roma plaintiffs since

2007, the achievements related to process, to recognition of rights, and to the public awareness and pressure for reform are significant and very important. But they have so far failed to gain sufficient leverage to change the underlying structures and logics that keep Roma children down, that render them 'mentally deficient' in order to remove them from integrated educational spaces from which high quality secondary, not mention higher, education might be accessible.

I would like to return here at the end to the reasoning of the Hungarian government in favor of placing and retaining Roma children like András Horváth and István Kiss in special schools, under the yoke of diagnoses of educational insufficiency. They claim that tests and standards tailored to the Roma population would have no sensible meaning from the point of view of assessing a child's ability to cope with the mainstream education system – which was the purpose of the assessment of learning abilities of children and of the psychometric tests applied in the process ... The Government claimed that socio-cultural background had been decisive for the mental development of the child, and when the actual level of a child's mental development (IQ) had been measured, the result had necessarily been influenced by the same socio-cultural effects that had shaped the child's mental development.

What they are saying here is that it the very notion of unbiased tests or misdiagnosis misunderstands – from their point of view – how public schools actually work, and who they work for. Even the reform of the law to make evidence of some kind of organic involvement pre-requisite for the official diagnosis of mental retardation has not significantly the process or structure of the normal/special school relationship. Placement in special schools has been expanded to include those without obvious organic involvement but who have other learning and psychological problems that disqualify them from inclusion in mainstream schools. The maintenance of strong cultural (and 'scientific') beliefs in the racial reality of 'family and cultural disability', and the institutionalization of these beliefs in the medico-pedagogic structures of special education, serve as a guarantee that inclusion for a large group Roma students will not be realized.

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DIYANA DIMITROVA

## **Sociocultural competence of 7–11 years old students from ethnic communities in the digital world**

**Abstract:** The article presents a training model aimed at the formation of sociocultural competence in 7–11 years old students from ethnic communities in Bulgaria, based on Geert Hofstede's (2003) theory of culture. A schematical description of the teaching methodology of the model is offered as well as some results of a study among the trained students conducted according to pre-defined criteria and indicators. The article comprises methodological ideas for the formation of sociocultural competence in 7–11-year-old students in the conditions of digitalization considering the possibilities of the electronic textbooks, which are part of the compulsory educational content. It turns out that these textbooks are necessary for the purposes of training in the digital world, as well as for the COVID-19 pandemic.

**Keywords:** sociocultural competence, ethnic communities in Bulgaria, students, digital textbooks

### **Introduction**

The Bulgarian society is a multicultural one. This implies a permanent contact between the representatives of different minority communities, which is characterized by tolerance, empathy and intercultural consideration.

The conditions of the digital world, as well as those caused by the Covid-19 pandemic, suggest some changes and limitations in social relations. They determine that people communicate through technology. In any case, these circumstances cannot displace the main issue related to the need of building skills for communication with representatives of different ethnic and cultural communities. On the contrary – it is the new technologies that provide more and more opportunities for communication and meeting with *Others* – by joining social networks, dating sites, job searching websites, chats, online trainings, etc.

The dynamics of social and digital conditions along with the increased capabilities of the modern information society suggest more frequent communication between representatives of different ethnic and cultural communities. This is why there is an increased necessity to build sociocultural competence as a component of the communicative competence starting from an early school age. This issue is especially important for the progress of Bulgarian society, as the nature and specifics of the ethnic communities are projected onto communication and relationships within the school environment. Researchers are adamant that: “insofar as those differences are inherent in society, they are present at school” (Chavdarova-Kostova, 2010, p. 5)

The goal of the current study is to present a practically tested training model for forming sociocultural competence in 7–11 years old students belonging to different ethnic communities in Bulgaria, which is based on Geert Hofstede’s (2003) theory of culture, as well as to indicate some methodological ideas for the formation of this competence in digital environment through the possibilities provided by the electronic textbooks.

Objectives:

1. To define and derive the main characteristics of the concept of “sociocultural competence” for the educational purposes according to the proposed model.
2. To reveal in the most general plan the training methodology and to present results obtained during the model approbation.
3. To present methodological ideas for the sociocultural competence formation in 7–11 years old students in the context of digitalization and the application of e-textbooks for this purpose.
4. To outline some productive solutions e-textbooks usage during the Covid-19 pandemic.

### **The general theoretical context**

In the specialized scientific literature, the sociocultural competence is considered an essential component of the *communicative competence*. Researchers, in accordance with their goals, emphasize different characteristics of the concept while determining its content and thus outlining its parameters. What all authors agree on is the significance of that notion. It is believed that it serves to overcome the difficulties in the process of communication between representatives of different cultural backgrounds.



The concept of “communicative competence” was first introduced by D. Hymes in the 1960s. He tried to develop further N. Chomsky’s ideas about language competence. According to Chomsky, language competence comes down to acquiring knowledge of grammar rules. And one of Hymes’ main ideas is to link language to culture. According to him, language and culture are related to the overall organization of speech. Therefore, in addition to grammatical correctness, feasibility, and acceptability, the author draws attention to sociocultural knowledge, which are all closely related to values, relations and motivation in communication. This knowledge is important, especially when learners develop initial purpose-oriented communication skills. As Hymes himself points out, the learning child must acquire competence: “when to speak, when not, and as to what to talk about with whom, when, where and in what manner” (Hymes, 1972, p. 277).

Hymes’ model is gradually becoming the subject of numerous studies for the purposes of language teaching. In 1985, Jan van Eck developed another, broader model of communicative competence that combined almost all studies. It consists of six main components. The individual components (linguistic, discourse-strategic, socio-linguistic, sociocultural and social competences) provide clarity about the abilities that build communicative skills. The Linguistic competence is associated with mastery of grammatical structures and language rules. The Discourse competence finds expression in the ability of the learner to formulate and correctly use completed sentences, both in oral and written discourses. The Strategic competence is mostly associated with the use of verbal and nonverbal strategies by the participant in the communication act in case of special difficulties because of the lack of knowledge of certain words. The Sociolinguistic one is related to the ability to take into account the appropriateness of an expressions in accordance with the topic, the interlocutor, the situation, etc. during the act of communication. The Sociocultural competence is connected to the knowledge of the national-cultural specificities of the language studied as a foreign one. The Social competence is associated with the participants’ abilities to engage in communication for professional or personal purposes (Ilieva-Baltova, 2004, pp. 101–102; Dimitrova, 2019, p.18).

This brief specialized review makes it clear that researchers define sociocultural competence as an integral part of the structure of the communicative competence itself. Its main components include knowledge of language, values, culture.

In the construct of “sociocultural competence”, “*culture*” plays a key role in determining its characteristics. In the Bulgarian dictionary, the word “cul-

ture” has many meanings. Two of them are: “1). A set of spiritual and material values created by humanity during its historical past. *Spiritual culture. Material culture. Ancient culture.* 2). Education, knowledge, upbringing. *High culture. Low culture. I have a rich culture* (Bulgarian online dictionary). One of the world-famous researchers of culture, Geert Hofstede, explains its essence as a set of four main elements: *symbols, heroes, rituals and values*. He defines values as the “core” of culture. According to Hofstede: “the world of the child in every culture is filled with symbols, characters and rituals that together they embody and recreate that culture. Behind these manifestations are the values of this culture. They are learned from birth and manifest in similar ways in different contexts: family, school, etc.” (Hofstede, 2003, pp. 51–52).

For the purposes of this study, “*competence*” will be understood as knowledge, skills, and relations that students acquire during the education process. In the Bulgarian educational system, they are measured in accordance with the State Educational Standards, which are compliant with the European Framework of Key Competences for Lifelong Learning. These key competencies are fundamental for the Preschool and School Education Act (PSEA) and are described in Art. 77, para (1). of the Act, as follows: “1. Bulgarian language competences; 2. skills to communicate in foreign languages; 3. mathematical competence and basic competences in natural sciences and technologies; 4. digital competence; 5. learning skills; 6. social and civic competences; 7. initiative and enterprising; 8. cultural competence and creative expression skills; 9. skills to support sustainable development, healthy lifestyles, and sports.” (Zakon, 2016, p. 23).

The proposed educational model aims at forming sociocultural competence in 7–11 years old students belonging to different ethnic communities in Bulgaria. The model is based on the understanding that the development of sociocultural competence in students from the earliest school age will contribute to the mastery of knowledge, skills and relations, which ensure smooth communication with representatives of different cultures and ethnic communities. It is assumed that in order to make 7–11 years old students understand the culture of an ethnic community, it is necessary for them to know how the given culture manifests itself in symbols, heroes, rituals and values, as grounded in Hofstede’s theory.

For the purposes of the model, these manifestations are pointed out as general sociocultural knowledge, obtained by receiving sociocultural information about symbols, heroes, rituals and values of the major ethnic communities in Bulgaria (Bulgarian, Romani, Turkish, Jewish, Armenian, etc.).

In addition to Hofstede's concept, sociocultural knowledge is presented as a key component in the Common European Framework of Reference for Languages (2001), which lists elements and characteristics of a society's culture as follows:

1. Everyday living, e.g.:
  - food and drink, meal times, table manners;
  - public holidays;
  - working hours and practices;
  - leisure activities (hobbies, sports, reading habits, media)
2. Living conditions, e.g.:
  - living standards (with regional, class and ethnic variations);
  - housing conditions;
  - welfare arrangements.
3. Interpersonal relations (including relations of power and solidarity) e.g. with respect to:
  - class structure of society and relations between classes;
  - relations between sexes (gender, intimacy);
  - family structures and relations;
  - relations between generations;
  - relations in work situations;
  - relations between public and police, officials, etc.;
  - race and community relations;
  - relations among political and religious groupings.
4. Values, beliefs and attitudes in relation to such factors as:
  - social class;
  - occupational groups (academic, management, public service, skilled and manual workforces);
  - wealth (income and inherited);
  - regional cultures;
  - security;
  - institutions;
  - tradition and social change;
  - history, especially iconic historical personages and events;
  - minorities (ethnic, religious);
  - national identity;
  - foreign countries, states, peoples;
  - politics;
  - arts (music, visual arts, literature, drama, popular music and song);

- religion;
  - humour.
5. Body language. Knowledge of the conventions governing such behaviour form part of the user/learner's sociocultural competence.
6. Social conventions, e.g. with regard to giving and receiving hospitality, such as:
- punctuality;
  - presents;
  - dress;
  - refreshments, drinks, meals;
  - behavioural and conversational conventions and taboos;
  - length of stay;
  - leave-taking.
7. Ritual behaviour in such areas as:
- religious observances and rites;
  - birth, marriage, death;
  - audience and spectator behaviour at public performances and ceremonies;
  - celebrations, festivals, dances, discos, etc. (CEFR, 2001, c. 102–103).

In this sense, it can be stated that the proposed model corresponds to the sociocultural knowledge specified in the Framework.

### **A model for formation of sociocultural competence in 7–11-year-old students from different ethnic communities**

The proposed model of education is differentiated in various organizational forms: school extracurricular forms, forms of all-day education – activities by interest common for the elementary stage, clubs, etc. In its core, the model is an organization of the educational process having the main goal to form knowledge and skills in the 7–11 years old students to get to know the ethnic communities in Bulgaria (Bulgarians, Romani, Turkish, Jews, Armenians, etc.) through studying elements of their culture such as *symbols, heroes, rituals, values*. The main means of work is a special textbook, which includes selected tales that are typical for each ethnic community in Bulgaria, but one can find other cultures around the world represented as well. By genre and thematic diversity, the fairy tales are: folk, magical, legends, etc. In the textbook some colour applications are included, designed for visual activities

for the students (for example, colouring elements of the community's culture: flag, traditional clothing) as well as activities related to cutting, application, etc.

In summary, the methodological work is based on the following stages:

1. Explicit presentation of sociocultural information about the ethnic communities in Bulgaria, which includes acquaintance with the symbols and rituals from the ritual-festive system of the community, significant historical facts, information about legendary heroes, etc.
2. Getting acquainted and comprehending the fairy tale, which reveals opportunities for awareness and interpretation of actions, deeds and relationships between the typical heroes. Through interpretation and evaluation performed by the students, they could reach an understanding of moral criteria established in the community.
3. Comparative analysis of two or more tales – Romani, Bulgarian, Armenian. The main purpose is to build students' ability to discover wisdom, virtues and generally accepted values.
4. Implementation of applied activities, related to establishing interdisciplinary links.

The conceptual framework of the methodological work is based on the understanding that before reading/listening to and analyzing a fairy tale or other literary work related to the culture of an ethnic community, it is an important condition for young students to have familiarized with the necessary sociocultural information about this community. This condition requires from the teacher a very good preliminary planning of the process of sociocultural competence formation in order to achieve consistency and completeness of each of the stages.

The observance of this sequence is justified by the understanding that thus a systematization of the sociocultural information is achieved, which at a later stage is transformed into a permanent sociocultural knowledge. The sociocultural information within the model is presented mostly by multimedia using PowerPoint, but in terms of digitalization, this can be achieved through various educational software products. During the model practical probation in real school environment, *PhotoStory 3* and the Bulgarian educational software product *Envision* were mostly used.

## **Methodology of the study**

The presented model has been tested in practice in 2014/2015. The study involved 80 4<sup>th</sup> grade students, divided into two main groups – experimental group (EG) – Roma students and control group (CG) – Bulgarian students. The CG included 40 students from the Municipality of Yambol, and the EG – 40 students from the Municipality of Veliko Tarnovo.

The reporting of the results is based on preliminary defined criteria and indicators. For the purposes of this study I present some of the results obtained from the data under *Criterion I – Ability to recognize and identify facts and events* and *Indicator: 1 – Able to recognize representatives of ethnic communities by pictures reflecting the cultural specifics in traditional clothing (symbol of culture)*. The obtained data are ensured by tests for checking students' skills at the entry, intermediate, and exit levels.

The data was analysed statistically using the Statgraphics.

## **Analysis of the results**

The formulations of the presented criterion and indicator are compliant with the level "Remember" in Bloom's taxonomy. This is one of the most widely used taxonomies for educational purposes and for the development of tests to assess students' achievement. In its core is a scale of six main cognitive levels: knowledge, understanding, application, analysis, synthesis, evaluation. In 2001, the taxonomy was revised by Andersen and there were structural and terminological changes introduced. The words used to name the individual levels change from nouns to verbs. This is how the new categories are named: remember, understand, apply, analyze, evaluate, create. For each of the levels, "active verbs" are used to represent a particular participants' action or behavior. The level "Remember" is illustrated by the verbs: remembers, recognizes, recalls (Bogdanov, 2011, p. 10) In accordance with the above criterion and indicator, the achievements of students at the entry, intermediate and exit levels are assessed. The average values of Control Group (CG) and Experimental Group (EG) are monitored. The basis of this analysis is the students' achievements according to the correctly recognized number of paintings and their connection with the name of the ethnic community. The differences are compared statistically by reporting the results for each CG and EG student.

The comparison of the Control Group (CG) and Experimental Group's (EG) achievements is additionally conducted by analysis of variance for repeated measurements. The results are shown in Table 1.

Table 1. Fisher's criterion and P (F, Df1, Df2) when checking the hypothesis of equality of a series of average values. Task 1.

Source	Sum of Squares	Df	Mean Square	F-Ratio	P-Value
<b>Between groups</b>	411.202	14	29.3715	<b>17.84</b>	<b>0.0000</b>
<b>Within groups</b>	380.233	231	1.64603		
<b>Total (Corr.)</b>	791.435	245			

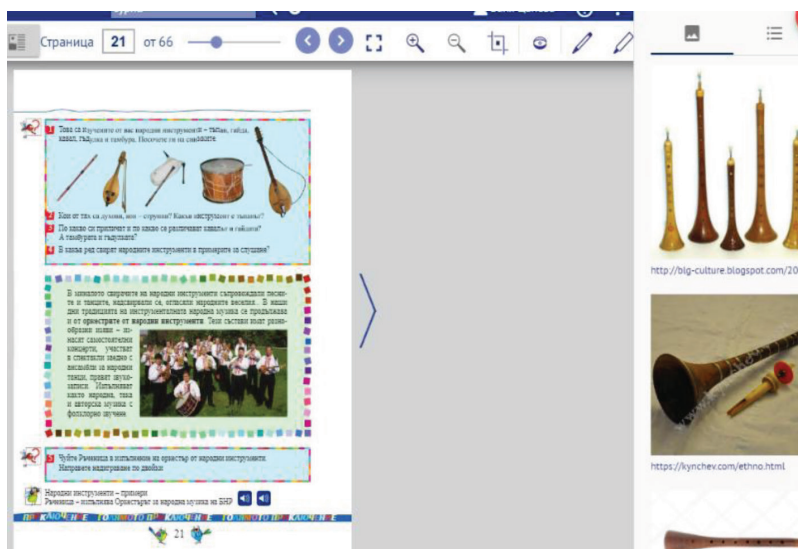
The statistical significance of the studied effects is seen by the value of the observed significance level. If the obtained value of F is less than the critical value ( $F < F_{\alpha; k_1; k_2}$ ) or  $P(F, k_1, k_2) \geq \alpha$ , it is assumed that the null hypothesis does not contradict the experimental data. Otherwise, the null hypothesis is rejected.

The obtained results and their graphical presentation demonstrate that there is a relatively large difference in the students' answers. This is evident from the presented average values for entry, intermediate and exit levels. The achievements of the CG 4<sup>th</sup>-graders for entry level are oriented towards the higher values and are more condensed, while the EG students' results are expressed in lower values and there is a greater distraction. Therefore, the students in the control classes have higher values of the entry measurement in contrast to the students in the experimental classes. This means that when completing the test task all CG students correctly identified and linked with an arrow four of the five pictures in the test. Therefore, students show good skills of recognizing external cultural features reflected in traditional clothing of the ethnic communities (Armenian, Romani, Jewish, Bulgarian, etc.). The average values of the EG students vary in the range between: (-1.53) and (-1.42). The average values reported in the *intermediate* measurement are almost the same. A visible change in the average values of the EG and CG students occurs within the *exit* measurement. The differences between the results at the entry and intermediate levels can be explained as follows – the probable reason for high results of the CG students may be due to an accidental correct answer or the so-called “*guessing*” the right answer. Because of the analysis of the entry and intermediate levels results, a decision was made to complicate the task. This change was necessary in order to avoid the chance of guessing the correct answer. Thus, in the exit level test, new requirements have been added to the first task. That meant that students

were required not only to recognize traditional clothing, but also to name elements and/or parts of it in order to demonstrate more in-depth knowledge.

## Methodical ideas for the formation of sociocultural competence in the conditions of digitalization

Figure 1 and 2. The elektronic textbooks – examples





The Bulgarian educational system uses textbooks and workbooks both on paper and electronically. The electronic textbooks have been developed in compliance with the students' age specificities as indicated in Art. 153, paragraph (2) of the PSEA (Act, 2016, p. 54). For the model's purposes, e-textbooks have not been used, but their capabilities guarantee a successful achievement of sociocultural competence if they are applied purposefully in the learning process. Electronic textbooks are essentially digital versions of the printed textbooks. They include variety of electronic resources for carrying out a lesson: video files, tests, games, exercises, etc. The e-textbooks and their content allow the formation of sociocultural competence in 7–11 years old students in the way described above in the model. For example, in the 4<sup>th</sup> Grade Textbook on Technology and Entrepreneurship the topic "Once upon a time" is included. It presupposes acquaintance with cultural traditions and customs in Bulgarian folklore. The theme gives an opportunity to reveal the rich heritage of traditional Bulgarian folklore to be revealed. At the same time, elements from the folklore of other ethnic communities in Bulgaria can be presented and similarities and differences can be highlighted, for example in traditional clothing among Bulgarians and the Roma. To accomplish that, the teacher could present the photo material of traditional Roma clothing included in the textbook. The e-textbook could provide an integrative connection with music as well. Appropriate music files can be found embedded in e-textbooks or through the Internet connection, revealing the richness of traditional folklore for a given culture.

In the Covid-19 pandemic situation, e-textbooks are widely used in online learning for students of all levels. They are extremely useful as they provide a full experience of the content to be learned. They allow not only teaching new material, but also assessing students achievements. Most often this is done through built-in tests and exercises. E-textbooks also provide the possibility of a non-stop educational process during the pandemic. The direct observations as well as the shared opinions support the claim that the effect of e-textbooks usage leads to excellence and continuous learning process despite the different conditions the contemporary realities impose.

## **Conclusions**

The fact that the Bulgarian society consists of various ethnic groups requires high-level communication skills and sociocultural competence of teachers. The presented model for the formation of sociocultural competence and the

described methodological ideas for the application of e-textbooks provide additional ways for establishing and maintaining sociocultural relation in 7–11 years old students from different ethnic communities.

The presented model of training for the formation of socio-cultural competence in 7–11 year old students from ethnic communities and the described methodological ideas for the application of e-textbooks confirm the importance of the problem. Achieving socio-cultural competence in primary school is an urgent need to gain a positive, tolerant attitude towards the “*different*” and the “*otherness*” from an early age. It is an indisputable fact that in recent years special attention has been paid to the problems of intercultural education, and this implies stimulating the interests of students to study the cultures of different communities in Bulgaria and around the world. The aim is to discover and develop the potential of each student, regardless of their culture and ethnicity.

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# **R**ESearch REPORTS



ANNA SZAFRAŃSKA

## **Borderland as a space fostering the contracting of mixed marriages – the truth and myths**

**Abstract:** Globalization phenomena not only enhance cultural cognition but also foster establishing close relationships, which might be also legally confirmed. Today, many borders – like the Polish-Czech one – are “dematerialized” and exist more in the memory and awareness of people than in the physical sense. For the needs of the analyses, the category of borderland in its territorial sense was applied. Living in the borderland provides chances for establishing close interpersonal relations. What enhances the establishing of such relations in the case of the Polish-Czech borderland are the similarity of languages, common history and cultural closeness. This also fosters contracting mixed marriages. However, do close neighbourhood and similar social environments really make people seek contacts with neighbours? Does this enhance shaping a positive attitude to cultural diversity. The conducted analyses were aimed at familiarizing with the declarations of the examined university students from Poland and the Czech Republic concerning the way in which mixed marriages are perceived in their environment.

**Keywords:** Polish-Czech borderland, mixed marriages, students

\* \* \*

Globalization phenomena not only enhance cultural cognition but also foster establishing close relationships, which might be also legally confirmed. The easiness of moving around, tourist curiosity, searching for information about unknown places in the world, or mobility imposed by work cause that one meets people of other nationalities or representatives of other cultural circles. Moreover, media show with growing frequency or even promote the models of relationships which not long ago were considered exotic, very rare, different. In Poland, many programmes<sup>1</sup> show foreigners as “friendly Others”,

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<sup>1</sup> One of the most popular programmes was “Europa da się lubić [Europe is likeable]”, which had the highest popularity ratings. Its heroes, who became the favourites of Poles almost overnight, largely contributed to the interest in the countries from which they came, but also showed that national stereotypes, so widely present in the

interested in our country, settling down and raising families here. As a result, contemporary mixed marriages do not face such amazement and increasingly rarely result in rejection or stigmatization.

Currently, many borders – like the Polish-Czech one – are “dematerialized” and exist more in the memory and awareness of people than in the physical sense. Borderland is a category explored by many scientific disciplines. It is an object of numerous theoretical concepts in philosophy, economy, political studies, sociology or pedagogy. A borderland is a territory situated between two state (or regional) areas, characterized by ethnic or national migration resulting from the location in spatial closeness (Kłoskowska, 1996, p. 125).

Therefore, it can be treated as:

- physical territory – an effect of the indicating (in a certain space) of a border between states or nations;
- social space characterized by strong cultural diversity of both the material and non-material world. It refers to such spheres as tradition, religion, historical memory or the awareness of national belonging.

In a broader, interdisciplinary perspective, borderland was discussed by L. Witkowski, who made a philosophical-aesthetic reinterpretation of M. Bakhtin’s concept. In his concept, Witkowski takes into regard four aspects of (the understanding of) ontology concerning “being between”: borderland understood as a space, territory; high saturation of interactivity; detailed specification in the context of differences and similarities (of relations); and the creation (due to participants’ ambivalent status) of the cultural situation, subjects or descriptive categories (Witkowski, 1991).

For the needs of the presented analyses, the category of borderland in its territorial sense has been applied. Forms of coexistence are shaped through being next to – closeness to each other and mutual contacts (Sadowski, 2008). The research analysed in this study was done among academic youth – students living in the borderland space of Poland and Czech Republic. The young currently living in the Polish-Czech borderland are a new generation, different than their earlier peers. This specificity and unlikeness has its sources in the sociocultural, political and economic situation of Poland, Europe and the world, which also constitutes an important reference point (Ogrodzka-Mazur, 2013, pp. 106–127). Life in the borderland provides a chance for establishing close interpersonal relations. In the case of the Polish-Czech

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Polish culture, were not always confirmed. Steffen Möller, a German, can serve as an example.



borderland, the linguistic similarity, often commonly shared history, and cultural closeness are the factors that enhance close relationships. According to A. Sadowski, the borderland situation means some particular phenomena of a mass and permanent flow (permeating) through cross-cultural borders of people, their cultural models, values, along with intense activities aimed at maintaining or developing these contacts by the neighbouring communities, their institutions and particular inhabitants (2008, p. 23). Yet, do the close neighbourhood, similar sociocultural determinants and linguistic similarity really make one seek a contact with the neighbours, enter close relations and facilitate nationally mixed relationships? My earlier studies among teachers often do not confirm this (Szafrąńska 2017, 2019). Therefore, it seemed interesting to me how the issue of mixed marriages is viewed by young adults inhabiting the Polish-Czech borderland.

### **Methodological foundations of the research**

The processes of transformations in Poland, the Czech Republic and other countries of Central and Eastern Europe encouraged (in 2018) undertaking comparative team studies on cultural identity and education of young adults. The research comprised 330 university students – 164 in Poland (Cieszyn) and 166 in the Czech Republic (Ostrava). The sample was representative for pedagogy students educated in the University of Silesia and the University of Ostrava. In the academic year 2017/18, 518 students undertook both full-time and part-time studies in the course *pedagogy* at the Faculty of Ethnology and Education of the University of Silesia. The required representative sample size was specified with the help of the sample size calculator. For the size of population, the following was assumed: fraction size 0.5, confidence interval 85%, maximum error 0.5 (the 9% error is still acceptable for concluding in social sciences, the estimation results are valid). As Dorota Węziak-Białowska claims, concluding with the 15% error constitutes the lower limit for not accepting (2013). The representative size for Polish students was 148 people. In the academic year 2017/2018, 2240 students were educated at the Faculty of Education in Ostrava. The research was conducted with the use of a questionnaire survey sent to students' by e-mail. The sample consisted of 166 respondents who had fulfilled the questionnaire. These were full-time and part-time students educated in various pedagogical courses both with and without teaching qualifications. The sample was representative with the assumption of the maximal error of 8%.

The nationality composition was slightly different. This results from the fact that 2 respondents in Poland indicated their Czech nationality (students from Zaolzie) and 1 declared another (Ukrainian) nationality, whereas in the Czech Republic 2 students declared a different nationality than the Czech one. Altogether, 161 students declared Polish nationality (48.9%), 165 Czech nationality (50.2%), and 3 (0.9%) another nationality (cf. Figure 1 and 2). One person did not declare nationality at all.

The respondents were mostly aged 19–22 – such age was indicated by 170 students (51.7%). A similar number of respondents were aged 23–26 – 80 (24.3%) and 27 years and more – 79 (24%). Among students from Poland, there are much fewer people belonging to the oldest age group.

The analyses made for the needs of this article<sup>2</sup> were aimed at familiarization with the declarations of the respondents from Poland and the Czech Republic pertaining to mixed marriages. The answers were sought to the following questions: What are respondents' opinions on mixed marriages? What difficulties do they notice in their functioning? (How) Does the level of significance attributed to religion and its issues determine the attitude of respondents to the problems resulting from the functioning in mixed marriages?

### **Mixed marriages in the declarations of Polish and Czech students – a research analysis**

In expert literature, mixed marriages are distinguished in regard to different qualities of partners, such as: nationality, home country, ethnic origin, race, religion. In the case of marriages involving people of different nationality or citizens of different states, the notion of binational or trans-frontier marriages is often used (Rajkiewicz 2009, p. 170). Another term is applied by M. Jodłowska-Herudzińska – intercultural mixed marriages. The author emphasizes that a specific situation takes place in such marriages – a “meeting” of partners who represent different cultures and decide to get married, which means a shared life, mutual support and bringing up children (2001,

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<sup>2</sup> Extensive analyses of the studies were presented by the Polish-Czech team in the monograph: Ogrodzka-Mazur, E., Szafrńska, A., Malach, J. and Chmura, M. 2021. *Cultural identity and education of learning young adults in selected countries of East-Central Europe. A Polish-Czech comparative study*. Göttingen: Vandenhoeck & Ruprecht Verlage.

pp. 279–289). This “meeting” or the widely described within intercultural education clash of cultures is a factor that substantially determines the way in which mixed marriages function. Homogamy means the marital union between people of similar ethnic origin, nationality, religion, education, or socio-economic status. The bigger the similarity is, the bigger homogamy (as an indicator of the integrity of the category and the sharpness of social barriers) takes place (Brzozowska 2015, p. 9). It is assumed that the degree of partners’ similarity (especially as regards cultural qualities) determines marital satisfaction. Therefore, as a rule – mixed marriages are more difficult relationships (Jodłowska-Herudzińska 2002, p. 174).

The question was asked how mixed marriages were perceived in their environment (cf. Table 1). In general, in most of the answers 173 respondents (over 52%) indicated that the perception of such marriages was good. The most frequent answer was “positively” – 132 respondents (39.6%). The second largest group indicated “indifferently” – 112 people (33.6%). The answer “very positively” was chosen by 41 students (12.3%). A slightly smaller group of 35 respondents (10.5%) claimed that mixed marriages were perceived negatively and 7 respondents (2.1%) – very negatively.

Table 1. The perception of mixed marriages in the respondents’ environment

	Number	%
Very positively	41	12.3
Positively	132	39.6
Indifferently	112	33.6
Negatively	35	10.5
Very negatively	7	2.1
No answer	6	
Total	327	98.2

Source: own research N=333.

There are slight differences in the way mixed marriages are perceived by Polish and Czech students. The largest group of respondents declared positive perception of such marriages in their environment. Yet, much more frequently, these were Czech students (72; Poles – 59). A neutral attitude to mixed marriages was more often declared by Poles (60; Czechs – 51). “Very positively” was indicated more frequently by students from the Czech Republic (22), as well as the answer “negatively” (19; 15 – Poles). The answer “very negatively” was declared by 5 Polish students and 2 Czech ones (Table 2).

Table 2. The perception of mixed marriages in the respondents' environment with a distinction between students learning in Poland and the Czech Republic

	Very positively	Positively	Indifferently	Negatively	Very negatively	Total
Students from PL	19	59	60	15	5	158
Students from CZ	22	72	51	19	2	166
Total	41	131	111	34	7	324

Source: own research N=324.

Another issue investigated by me was how the respondents view the difficulties/problems which a mixed marriage can face. The question could be answered with a choice of six answers or one could write one's own answer. In the provided answers, the problems were taken into account which refer to functioning in various social groups and relationships, as well as the problems related to various fields – from educational problems with children, through barriers in communication, to professional issues.

The most frequent answer was intolerance of native residents (33.3%) – the people from the same nationality group. This is surprising as it indicates lack of acceptance experienced by people in such a relationship in their own cultural group. Thus, maybe due to their own experiences, students tend to attribute hermeticity to these groups, as well as the blocking of others who might want to join that group by formal marriage. The second largest group of respondents (25.8%) indicated assimilation problems in the residence place and social isolation. In this case, the respondents focus on a problem which is not limited only to one cultural circle –  $\frac{1}{4}$  of the respondents stress that mixed marriages may experience social isolation. This seems dangerous as it leads to the marginalization of such families, which poses a particular threat in the situation of children raised in a mixed family. For 17.4% of students, the most important problems were those related to language communication. While the two previous groups of answers result from the social attitude, this case involves barriers associated with language competences of people deciding to change e.g. their residence place and, as a consequence, the necessity to acquire another language. The other answers were much less frequent. The difficulties associated with finding a job were indicated by 6.9%, 6% of the respondents pointed to the lack of acceptance by the married couple's family/families. The latter answer is of particular significance, especially in the context of a large number of people declaring that the native inhabitants' intolerance is a problem. The examined students rarely notice that this intolerance pertains to members of the nearest family. What seems equally optimistic is that the respondents rarely (only 4.2%) notice that problems concern

the bringing up of children. The same number of students indicated “others”, which involved such answers as “none” (students from the Czech Republic) and general answers like “religious and cultural differences” (students from Poland). The detailed data are presented in Table 3.

Table 3. The difficulties which mixed marriages can face as indicated by university students from Poland and the Czech Republic

Respondents' answers	Number	%
Intolerance of native residents	111	33.3
Assimilation problems	86	25.8
Difficulties associated with finding a job	23	6.9
Problems with related to language communication	58	17.4
No acceptance from the family	20	6.0
Problems with raising children	14	4.2
No answer	7	
Others	14	4.2
No data		2.1
Total	333	100.0

Source: own research

There is a statistically significant dependence with low association strength between the place of studying (PL/CR) and students' answers for  $p=0.004<0.05$  Cramer's  $V=0.242$ . The students from Ostrava more often claimed that mixed marriages had assimilation difficulties in their place of residence due to social isolation and communication problems. The students from Poland more often stated that mixed marriages face intolerance from native residents. The detailed data are comprised in Table 4.

Table 4. The surveyed students' opinions on the problems which mixed marriages might face in regard to the place of studying

	intolerance...	assimilation problems	difficulties with ...	commu- nication problems	no acceptance	problems with raising...	others	Total
PL	68	39	7	23	11	7	2	157
	43.3%	24.8%	4.5%	14.6%	7.0%	4.5%	1.3%	100.0%
CZ	42	46	16	35	9	7	11	166
	25.3%	27.7%	9.6%	21.1%	5.4%	4.2%	6.6%	100.0%
Number	110	85	23	58	20	14	13	323
%	34.1%	26.3%	7.1%	18.0%	6.2%	4.3%	4.0%	100.0%

$\chi^2=18.921$ ;  $df=6$ ; for  $p=0.004<0.05$  Cramer's  $V=0.242$

Source: own research.

Another item to investigate was whether and how the respondents' attitude to religion and religious issues determines the perception of problems experienced by mixed marriages. Those who are familiar with the specificity of the importance of religion for Poles and Czechs know that whereas this is an issue of particular significance for Poles (though this is changing in the case of youth), Czechs are considered to be one of the most secularized European nations. The respondents were to indicate on a four degree scale (from very important to quite unimportant) the significance of religion and religious issues in their life. The  $\chi^2$  test indicated statistical significance ( $p=0.000<0.05$ ) of the relation between the significance of religion and religious issues in one's life and the place of studies. Cramer V indicated a correlation with high association strength at the level of 0.543. Substantially more often, students from Poland regard religious issues as very important (82.4%) and important (70.5%). The respondents studying at the University of Ostrava much more frequently treat them as unimportant (74.5%) or quite unimportant (82.5%). The details are presented in Table 5.

Table 5. Respondents' attitude to religion and its issues in regard to the place of studying

		Students from Poland	Students from the Czech Republic	Total
Very important	Number	61	13	74
	%	82.4%	17.6%	100.0%
Important	Number	67	28	95
	%	70.5%	29.5%	100.0%
Unimportant	Number	25	73	98
	%	25.5%	74.5%	100.0%
Quite unimportant	Number	11	52	63
	%	17.5%	82.5%	100.0%
Total	Number	164	166	330
	%	49.7%	50.3%	100.0%

N valid observations: 330

$\chi^2=97.33$ ;  $df=3$ ; for  $p=0.000<0.05$  Cramer's  $V=0.543$  Much less often (18.2%)

Source: own research.

The people who consider religion and its issues as very important in their life most frequently (40.8%) regard the intolerance of native residents as the biggest problem that mixed marriages can face. Much less often (28.2%), they indicated the problems related to assimilation in the residence place / social isolation. They very rarely (2.8%) pointed to the difficulties in finding work.

Similar declarations appeared in the group of respondents who declared that religious issues are important to them. Most frequently (though more

rarely than in the previous group), they indicated problems associated with native inhabitants' intolerance of mixed marriages (35.9%) and problems with assimilation in the residence place (22.8%). The representatives of this group most often among all respondents indicated lack of acceptance on the part of the partners' family/families (8.7%). The detailed data are presented in Table 6.

Table 6. Respondents' attitude to religion and its issues versus their opinion on problems experienced by mixed marriages

Religion and its issues in my life are regarded as:		1	2	3	4	5	6	7	total
very important	Number	29	20	2	11	4	4	1	71
	%	40.8%	28.2%	2.8%	15.5%	5.6%	5.6%	1.4%	100.0%
important	Number	33	21	4	16	8	6	4	92
	%	35.9%	22.8%	4.3%	17.4%	8.7%	6.5%	4.3%	100.0%
unimportant	Number	34	23	11	20	4	1	4	97
	%	35.1%	23.7%	11.3%	20.6%	4.1%	1.0%	4.1%	100.0%
quite unimportant	Number	14	21	6	11	4	3	4	63
	%	22.2%	33.3%	9.5%	17.5%	6.3%	4.8%	6.3%	100.0%
	Number	110	85	23	58	20	14	13	323
	%	34.1%	26.3%	7.1%	18.0%	6.2%	4.3%	4.0%	100.0%

Legend: 1 – intolerance... 2 – assimilation problems; 3 – difficulties with...; 4 – communication problems; 5 – no acceptance; 6 – problems with raising...; 7 – others

In the group of respondents who declared that religious issues are unimportant in their life, the most frequently chosen answers were also those which concerned intolerance of native residents (35.1%) and assimilation in the residence place (23.7%). In this group, there was the biggest number of respondents who pointed to problems with communication (20.6%) and finding a job (11.3%).

The last (and the smallest) group were the respondents who declared that religious issues are unimportant to them. The composition of answers is different here as the biggest number of people here indicated assimilation problems (33.3%).

## Conclusions

The Polish-Czech borderland is a specific space, especially in the area of the euroregions of Cieszyn Silesia and Beskidy. As a result of a long-term process of the diffusion and overlapping of different cultures, a specific type of com-

munity, which represents various cultural (also language-related) patterns, has come into being. There are many mixed marriages in the borderland. This is enhanced by the situation on the Czech side, where a large Polish community lives. However, this is not a homogeneous group. Some members cherish Polish culture and traditions, which is facilitated by the network of schools in Zaolzie educating in Polish. Some people of Polish origin have undergone assimilation, which has often resulted from establishing mixed marriages and bringing up children in the culture of the dominating (Czech) group. The situation on the Polish side, where there are much fewer such marriages, is slightly different.

The examined students are most often of the opinion that mixed marriages are viewed positively in their environment, almost 1/3 (33.6%) emphasize that such relationships are treated with indifference and 12.6% that the environment's attitude to such marriages is negative. Slightly more frequently, Poles point to indifference which mixed marriages face in their environment, whereas students from the Czech Republic more often indicate a positive image of mixed marriages in their circles. Thus, it seems surprising that while pointing to problems which mixed marriages have to handle, the respondents indicate most often the lack of acceptance by their own cultural group and the situations related to social isolation. Unfortunately, the applied research methodology has not made it possible to find out how this difference in declarations came into being – the difference between the general social perception of mixed marriages and the noticing of problems which, as the analyses have revealed, exist mostly in the environment. This is particularly visible in the declarations of the respondents who treat religion and religious issues as very important or important. In the studies, the problems related to employment and communication barriers were indicated much less frequently.

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## **The English language as a reflective judgement component in the intercultural Erasmus exchange to and from Poland**

**Abstract:** In the empirical study of intercultural exchange presented in this paper, we assessed Erasmus students for knowledge of English as a foreign language (EFL) and their level of reflective judgement, to test for correlation between the two variables. The basic theoretical framing was derived from King and Kitchener's (1994) reflective judgment model (RJM), based on 3 different levels of reflectivity, connected to progressive cognitive development of adults: pre-reflective, quasi-reflective and reflective. The results of the study show that the students displayed high levels of reflective judgment and importantly, we found a correlation between their standard of English and their level of reflectivity. The ability to communicate in English is a prerequisite to participation in the Erasmus programme, therefore it was expected that the students would score well for English knowledge. However, the results of the study suggest that being competent in the use of English as a foreign language may be a predictor of higher reflectivity amongst students in higher education. This creates a controversial pedagogical implication suggesting that learning English as a foreign language to a high standard fuels reflectivity.

**Keywords:** reflective judgement, English as a foreign language, EFL, higher education, Erasmus, study abroad

### **1. Introduction**

A comprehensive review of programmes for students to study abroad was carried out by Tullock and Ortega (2017) using over 400 study materials from 1995–2017. They established that the evidence on linguistic gains expected from studying a language abroad is inconclusive, incidental and often leads to conflicting results. Nevertheless, a range of coexisting social, professional and personal benefits continue to be a major selling point for students who are considering opportunities to study L2 abroad. In 2018 over 2 million students took part in the Erasmus exchange in 34 participating countries (Erasmus + key figures 2018).

In Spring 2020 many Erasmus exchange activities were temporarily frozen due to the COVID-19 pandemic in Europe (Erasmus + 2020). Some exchange students returned to their home countries, others remained in their host country and continued to benefit from the activating learning environment of a foreign exchange. The activating learning environment can be described by the complex dynamic systems theory (Han, 2019) that supports the idea that learners progress relies on the interplay of initial conditions, interconnectedness, unpredictability, adaptability, and complexity of the learners' first language. The above conditions, especially unpredictability, adaptability and complexity are the exact preconditions for activation of reflective thinking. In a former study by Serrano et al. (2011), Spanish students exposed to L2 in the context of Erasmus exchange to the UK outperformed those attending intense courses at home country in fluency and lexical complexity. Moreover, the study by Dao (2020) on peer interaction in effective learner engagement, indicate that there is indeed a high benefit in participation in activating learning environments, where peers can exchange their ideas with one another. It has been observed that this condition occurs spontaneously and naturally in Erasmus exchange groups.

Commencing our study, we wanted to test whether Erasmus students are individuals capable of reflective judgment at the highest level. Erasmus exchange students are expected to communicate in English as it is considered the Lingua Franca of European academia. We therefore decided to assess their knowledge of English as a foreign language, and to look for links between their reflectivity and the language aspect. We wanted to discover whether knowledge of English as a foreign language correlates with levels of reflectivity. If we were to find a positive correlation this could mean that achieving high standard of EFL triggers high levels of reflective judgement. Further studies would have to verify if this is a phenomenon related to English language in particular, or to any other foreign language taught as a first foreign language of a person. Nevertheless, it would add to the list of benefits/pros for the EFL learning.

## **2. Background**

### **2.1. Erasmus exchange programme – an overview of the outcomes**

In the context of multicultural and intercultural exchanges, positive inter-group relations formed due to study abroad programmes were found by Pet-

tigrew (1998), Gaertner and Dovidio (2000); Kennworthy et al. (2005). According to Stroebe et al. (1988), Stangor et al. (1996) and Ward et al., (2001) the exchange programmes decrease stereotypes about other nationalities, eradicate prejudice and ‘othering’ of other ethnic groups. Furthermore, they confirm that exchanges enhance critical thinking and accept the diversity of opinions and worldviews (c.f. Odrowąż-Coates 2017). The above features gained through the exchange programmes are in line with the higher level of reflective judgement. Could this be aided by the knowledge of the ‘common’ foreign language that creates a platform for cultural exchanges, situating conversation participants at similar linguistic advantage-disadvantage situation? Structural aspects of the English language acquisition as depicted by Odrowąż-Coates (2019) may dictate an equal ground for the Erasmus exchange participants from non-English speaking countries.

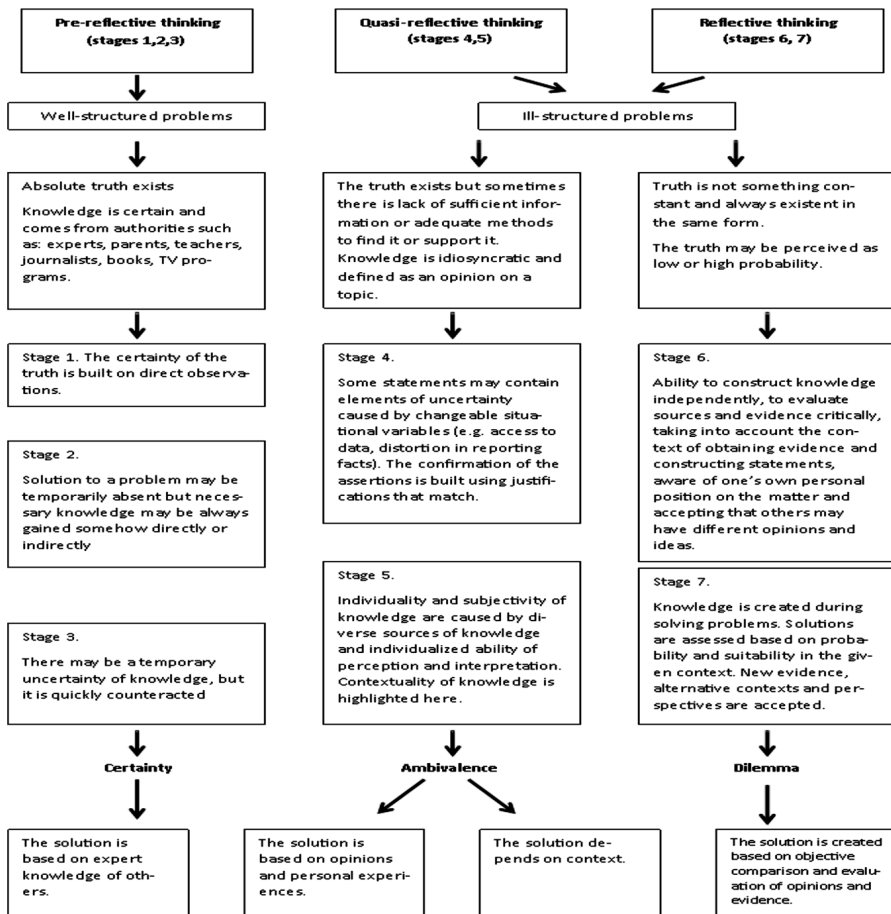
English language has become the *Lingua Franca* of Erasmus programme exchanges (c.f. Kalocsai, 2009, Kaypak and Ortaçtepe 2014, Llanes et al., 2016). Erasmus is the largest programme for student mobility ever developed in Europe. It involves the exchange of experiences, knowledge, information, worldviews and values. For the majority of beneficiaries, the exchange lasts one semester (EC 2019). Erasmus is meant to improve the quality of higher education in Europe on policy level (system), institutional level, and individual level. To date, the largest study of measurable effects of the Erasmus programme was carried out by “CHE Consult” (ESN 2012). The study involved 75 thousand students and graduates from 43 countries. The survey revealed the shared, personal traits of participants regarding reflectivity factors, such as problem-solving capacity, openness to challenges and change, curiosity and acceptance of values and behaviours of other people. Features such as entrepreneurship, creativity, curiosity, vitality and openness to ambiguity were confirmed in another study (EACEA 2014).

## **2.2. The reflective judgment model – research theory**

The theoretical basis for the model of reflective judgment may be found in classical studies of human cognition by Piaget or Kohlberg and several concepts aiming to explain cognitive and social functioning of humans (c.f. Dewey, 1933; Flavell, 1976; Perry, 1981; Broughton, 1978; Fischer, 1980; Kegan 1982; King et al. Wood 1983). The reflective judgement model consists of three levels describing how the knowledge is gained and how the opinions about the best course of action are justified: pre-reflective, quasi reflective

and reflective positioned in hierarchical order and gained in more and more advanced stages (King and Kitchener 2002). Figure 1 depicts the multiple levels of reflective judgement. It shows the connection between need for reflectivity when dealing with complex, difficult questions or problems that may possess many solutions. The precise description of the model and the research procedure is described in Odrowaz-Coates, Perkowska-Klejman (2017), as the model and the research procedure was successfully replicated.

**Figure 1.** Summary of reflective judgment stages – cognitive assumptions, well-structured and ill-structured problems and the levels of reflective judgment (adapted from King and Kitchener, 1994, 2002).



### **3. Methodology**

#### **3.1. Research questions**

The research addresses the following questions:

- What is the level of reflective judgment amongst international Erasmus exchange students?
- Is their age, gender or level of study interlinked with their level of reflective judgement?

And finally, we posed the main research question:

- Are EFL skills interlinked with the level of reflective judgment?

#### **3.2. Research design and context**

The main aim of the empirical study was to establish the level of reflective judgment (RJ) amongst Erasmus exchange students and to test whether there may be a link between RJ and EFL skills. Although “System” has released a significant number of articles dedicated to reflectivity as an educational category, found in the process of learning and teaching, sometimes identified as reflexive thinking or reflexivity, and a few papers dedicated to study abroad (SA = study abroad) programmes, the authors did not find any previous attempts to measure reflectivity of Erasmus students. RJ has remained a subject of study by many social scientists in the last 25 years.

Many studies confirm that reflective thinking is a developmental category, diversified by the level of study and the age of research participants (e.g.: King and Kitchener, 2002; Boyd, 2008; Fischer and Pruyne, 2002). King and Kitchener (1994) suggested that formal operations, academic ability, critical thinking and verbal aptitude are directly connected to the level of reflective judgement. Guthrie, King and Palmer (2000) found that development of reflective judgement is a strong predictor of tolerance for diversity and identity development and Odrowąż-Coates (2019) suggested that people with less conservative views are more likely to improve their foreign language skills abroad. The authors of this empirical enquiry, established in a preliminary study that reflective judgement is diversified by the subject studied (Perkowska-Klejman, 2018), therefore the sample of participants was purposely selected in order to reflect diverse fields of studies. Our study had an explorative and not a confirmative character in the areas of foreign language skills

and the socio-cultural factors, so no presumptions were made in this respect.

### **3.3. Limitations**

We realise that there are several limitations for the development of a more general theory. Firstly, there was no perfectly matched control group. We relied on the results of several previous studies of reflectivity amongst higher education students, which were carried out over the last 5 years (c.f., Perkowska-Klejman, 2014; Perkowska-Klejman, 2018; Odroważ-Coates, Perkowska-Klejman, 2019). Secondly, there was no clear indication found to show if participation in the Erasmus programme develops the competence of reflective judgment and to what extent it is already developed as a result of education in the country of origin. The same applies to foreign language acquisition, as we were unable to test the participants before they attended the Erasmus programme.

Moreover, the research was conducted in English. This language-based exclusionary practice poses additional problems for representation (c.f. Odroważ-Coates 2019). In this vein, a small number of questionnaires were not suitable for analysis and were not included in the sample due to a lack of English language skills displayed by a few participants. Notwithstanding these limitations, the answers given by the participants allowed us to run the language skill assessment, which was then cross-evaluated with the participants' self-declared EFL skills. In this sample the self-declared and the actual written level of English were highly coherent, indicating high self-reflectivity. Even though only those with sufficient EFL skills were able to participate, the data supports the purpose of the study, enabling us to measure the level of reflectivity amongst this particular, linguistically privileged group of students.

### **3.4. The reflective judgment interview**

The measuring of reflective judgment was carried out using a written version of The Reflective Judgment Interview (King and Kitchener, 1994). It is a semi-structured interview, containing specific descriptions of five cognitively ambiguous problems with several additional questions. Psychometric values of both orally conducted (Cronbach's alpha ranging from .75 to .96) (Wood, Kadrash, 2002) and the written version of the interview questionnaire are high (Cronbach's alpha = .85) (Perkowska-Klejman, 2018) so both methods

are confirmed as valid. An example of one of the five statements used in this Reflective Judgment Interview (ill-structured problem with additional questions) is as follows:

Ill-structured problem: The safety of nuclear energy is currently being debated by scientists in many fields. Some scientists believe that nuclear energy is safe and that nuclear energy can substantially alleviate our dependence on non-renewable resources. Others argue that nuclear energy is inherently unsafe and that nuclear energy plants will lead to widespread and long-term environmental pollution.

Additional questions:

- What do you think about this statement?
- How did you come to hold that point of view? On what do you base that point of view?
- Can you ever know for sure that your position on this issue is correct? How or why not?
- When two people differ about matters such as this, is it the case that one opinion is right and one is wrong? If yes, what do you mean by “right”? If no, can you say that one opinion is in some way better than the other?
- What do you mean by “better”?
- How is it possible that people have such different views about this subject?
- How is it possible that experts in the field disagree about this subject?

Every interview questionnaire filled in by the research participants was individually analysed to assess the level of reflective judgement on a scale 1–7 by two independent judges from outside of the research team. The final level of reflective judgement was presented using the arithmetic mean. This allowed us to carry out statistical analysis of the qualitative RJ questionnaire answers. The interview questionnaire also contained a short, anonymous demographic section and a linguistic self-assessment.

### **3.5. Participants**

The study took place between January 2018 and October 2019, it included 125 Erasmus exchange students from and to Poland. Those visiting Poland were from the following European countries: Albania, Belgium, Bulgaria, Czech Republic, Denmark, France, Greece, Germany, Hungary, Italy, Netherlands, Portugal, Slovenia, Spain, Sweden, Turkey. It should be noted that due



to the criteria used for selection, students who took part in the study were already immersed in the international learning environment and had been abroad between 2 and 4 months by the time of the interview. The snowball method was used to attract new willing research participants. This method used the internet and relied on participants recommending other Erasmus exchange students who may be interested in taking part in the study during their stay abroad. The researched group was diverse in terms of nationality, age, educational level and the subject of study; there was no control group selected. However, the comparison with multiple previous study results on reflectivity of Polish students, who were studying in Poland, carried out by Perkowska-Klejman (2014, 2018), and Perkowska-Klejman, Odrowaz-Coates (2019), show that the level of reflectivity was (on average) higher in the Erasmus exchange sample than in the general domestic one.

## **4. Research results**

### **4.1. The overall level of reflective judgement amongst Erasmus exchange students**

The overall median amongst Erasmus students, based on the model of reflective judgement was  $M = 4.65$  ( $SD = 1.03$ ,  $min = 2.6$ ;  $max = 6.60$ ). This is a relatively high median score, when compared to other studies of students in higher education who are not exposed to SA programmes (c.f. Perkowska-Klejman and Odrowąż-Coates 2019).

### **4.2. Gender, age and level of study and the level of reflective judgment**

The results presented in table number 1 show no significant difference for reflective judgment when gender is considered, using median comparison (t-test). Furthermore, the single factor ANOVA results are presented, showing strong correlation between age, level of studies and RJ. The age and level of study results are masked and therefore we run additional tests not shown in the table. When we tested correlation between reflective judgement level and two independent variables at the same time (age range and the level of studies), we received a corrected multifactorial ANOVA model for analysis of variance with  $F = 2.78$  ( $p = .02$ ). When these variables were tested individually against RJ, the connection between the level of studies and reflective judgment was weak

$F = .50$  ( $p = .47$ ) and the age range variable when tested on its own against RJ was also not statistically relevant  $F = 2.21$  ( $p = .71$ ). The tests were repeated, but with the age variable not grouped into age range. When we tested level of study and the age variable (not grouped into age range) against RJ, the Corrected Model showed a connection  $F = 2.48$  ( $p < .01$ ). However, when these two new groups of data were tested separately against RJ,  $F$  for the level of studies in this second model had no statistical validity  $F = .04$  ( $p = .52$ ) but the age did  $F = 2.15$  ( $p = .01$ ). This result suggests that individual age is a diversifying factor of reflective judgment. In our research group, 10 participants were over 30 and all of them displayed high levels of reflective judgment, with  $M$  between 5.2 and 6. Whilst results for 20–22 years old were at  $M = 4.5$ .

Table 1. Gender, age and level of study and the level of reflective judgment

Variable	M (SD)	Statistical test results
<b>Gender</b>		
Male (n=31)	4.66 (1.02)	$t = .92$ ( $p = .35$ )
Female (n=96)	4.46 (1.03)	
<b>Age (years)</b>		
18–19 (n=2)	4.3 (.70)	$F = 3.35$ ( $p = .01$ )
20–21 (n=46)	4.68 (1.05)	
22–23 (n=41)	4.22 (.94)	
24–25 (n=24)	4.78 (1.09)	
26 and above (n=14)	5.28 (.92)	
<b>Level of study</b>		
Bachelor (n=75)	4.53 (1.07)	$F = 4.99$ ( $p < .01$ )
Master (n=42)	4.58 (.99)	
Doctoral (n=8)	5.72 (.38)	

Source: Self generated

### 4.3. Foreign language skills, exposure to study abroad environment and the level of reflective judgment

As shown in the table above (Table 2), in our sample, we found no connection between level of reflective judgement and previous studies or stays abroad as an adult and no connection between the level of the second foreign language and the reflective judgement level. However, we found connection between EFL skills and reflective judgment levels. There was a weak statistical correlation between level of reflective judgement and having been abroad as a child, and a stronger connection between level of reflective judgement and the level of English as a foreign language. The results were indicative of tendency to link EFL skills with reflective judgement and vice versa.

Table 2. The level of reflective judgment M(SD), SA and the foreign language skills

	M (SD)	Statistical test results
<b>Previous stays abroad (as a child)</b>		
Yes (n=58)	4.80 (1.05)	t = 1.87 (p = .06)
No (n=69)	4.45 (1.02)	
<b>Previous stays abroad (as an adult)</b>		
Yes (n=112)	4.60 (1.05)	t = .46 (p = .64)
No (n=15)	4.73 (1.03)	
<b>Previous studies abroad</b>		
Yes (n = 16)	4.35 (1.03)	t = 1.08 (p = .27)
No (n = 111)	4.65 (1.04)	
<b>FL skills in multiple languages</b>		
1 foreign language (n=63)	4.57 (1.14)	F = .22 (p = .79)
2 foreign languages (n=61)	4.66 (.95)	
3 foreign languages (n=3)	4.33 (.98)	
<b>Level of English</b>		
just a few words (n=0)		F = 2.50 (p = .06)
poor (n=0)		
communicative (n=22)	4.17 (1.15)	
good (n=62)	4.57 (1.09)	
excellent (n=42)	4.90 (.83)	
native tongue (n=1)	5.00	
<b>Level of second foreign language</b>		
just a few words (n=2)	4.10 (.98)	F = .79 (p = .53)
poor (n=21)	4.80 (.82)	
communicative (n=24)	4.59 (.94)	
good (n=11)	4.47 (1.09)	
excellent (n=8)	5.07 (1.08)	
native tongue (n=0)		

Source: Self generated.

## 5. Discussion and conclusions

The results of the study confirm that the experience of studying abroad is associated with high reflectivity. Furthermore, a link between the level of reflective judgement and the level of EFL skills was verified. Also confirmed were similar links between the reflective judgment level and the age of participants, and between their exposure to a foreign language environment in childhood. A new question emerged. Are the more fluent users of EFL capable of expressing deeper and more elaborated comments in the RJQ? Could it be that they scored higher on the reflectivity scale simply due to their linguistic superiority? Even if this were the case (although, based on the RJQ evaluation we believe it wasn't), it highlights that the EFL level is a significant factor for equality of participation and equality of opportunity. Since all Erasmus exchange students

scored relatively high on the reflectivity scale, it demonstrates that participants of the Erasmus programme are in general more reflective than non-participants (c.f. Perkowska-Klejman 2014, 2018, Perkowska-Klejman&Odrowaz-Coates 2019). However, it is not possible to confirm whether they were already more reflective before participating in the programme or if the programme itself enhances their reflectivity. Entry criteria related to EFL level indicate that EFL users may be in general more reflective. Further studies in this area are necessary to continue testing this hypothesis.

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JOANNA SACHARCZUK

## **Development of intercultural communication competence – on the basis of a study conducted among Polish and Israeli secondary school students**

**Abstract:** The presented diagnostic study concerning intercultural competence was carried out in the pedagogical context of intercultural education. The research place was chosen purposively: it resulted from the intercultural character of Białystok. In the interwar period that the study refers to, the biggest national groups in the town were Poles and Jews. There were also Belarusians, Russians, Germans and Tatars.

As part of the analysis of intercultural competence of students from Poland and Israel I focused on the respondents' declarations concerning their knowledge of the social structure of pre-war Białystok. Then, I determined what motivates secondary school students to learn about the past. Developing the competence in the affective/motivational area is of key importance in intercultural communication. Identifying the reasons why secondary school students from Poland and Israel find it worth learning about the history of their ancestors is as important as knowledge of the history of our cultural group and other cultures. It was also important to determine the level of Polish youths' readiness to communicate with students from Israel, and vice versa. Diagnosing the students' competence allows educators to plan adequate educational activities aimed at broadening intercultural competence, to strengthen the existing resources, to improve the weak points, and fill in the gaps.

**Keywords:** intercultural competence, intercultural communication, intercultural education, social memory

### **Introduction**

Intercultural education is the area of pedagogy in which I did research into intercultural competence. It refers to the problems and needs of autochthonic cultural groups inhabiting the same territory for several generations, as well

as educational activities related to cultural borderland areas. The research place was chosen purposively and it resulted from the intercultural character of Białystok. In the inter-war period, which I referred to in the study, there were some Belarusians, Russians, Germans and Tatars in the town, and the two most numerous national groups (at least from the beginning of the 19<sup>th</sup> century up to WWII) were Poles and Jews (Dobroński, 2001, p. 172).

Nowadays, Białystok is an important city for Jews from Israel. People of Jewish origin born in Białystok before the war have visited Białystok every year together with their children to celebrate the anniversary of the Białystok Ghetto Uprising. Many of those Jews have already died, but their children and grandchildren still maintain contacts with the place their ancestors lived in. Since 2013, students from the Mekif Yehud High School in Israel have been visiting Poland and meeting students from schools in Białystok. This inspired me to examine the intercultural competence of students from Poland and Israel, so as to find out their (declared) knowledge concerning the past of their place of residence / the place where their ancestors were born or lived. I wanted to check the importance of identity of that place of the younger generation and learn the reasons why secondary school students from Poland and Israel think it is worth learning about the history of their ancestors. It was also crucial to determine their level of readiness to learn behaviors needed in intercultural communication.

### **Objectives of intercultural education**

The objective of intercultural education is to develop the competence in communicating with people from different cultures. Intercultural competence is gained in the social environment in which the individual is subject to group influence. Each educational environment has specific goals to meet, with the measurable effect of intercultural competence. A special role in developing this competence is played by the family – the basic community in which the processes of socialization and upbringing naturally occur. Apart from the family, the local environment and peer groups are a natural educational setting.

Analyzing UNESCO documents, Wiktor Rabczuk (2013) points to the primary principles of intercultural education, such as respecting the cultural identity of the learner, providing each learner with knowledge, attitudes and cultural competence necessary for active participation in the society, which contribute to respect, understanding and solidarity among individuals.

Interactions between cultures inspire educationalists to extend the educational offer with contents and tasks which Mirosław Sobecki defines as: “all the activities that refer to cultures and their elements being in the state of interaction (diffusion or interference) and aim at creating pedagogical acts whose effect is the development of appropriate attitudes of individuals and groups toward cultural diversity as well as conscious, reflective identification with one’s own cultural heritage” (Sobecki, 2007, p. 27). Intercultural education applies to children, adolescents and adults subject to school education and lifelong learning processes. Jerzy Nikitorowicz (2009, pp. 279–282) suggests that intercultural education should result in socio-cultural dynamization of various groups, self-discovery, and learning about other groups. As a result students will be able to integrate with others and get closer to them, at the same time maintaining their individuality and visions of development.

The basic goal of intercultural education is to build an intercultural society based on the principles of equality, tolerance, freedom, and a positive attitude to minority groups. The sense of security and freedom to manifest the identity of people from minorities depends on the policy of the dominant authorities. This may be a serious problem in the implementation of intercultural education assumptions, as pointed out by Tadeusz Lewowicki: “It is the power elites that determine the area of education for minority groups or those who are vulnerable (politically, economically, culturally etc.) on behalf of the dominant group. The policies of most states, regardless of their official declarations, prefer the processes of assimilation. It is one of the most serious obstacles to intercultural education as it is understood nowadays” (Lewowicki, 2000, pp. 27–33). Those who have power influence the policy of education, i.a., by manipulating with the historical memory. The politics of memory is a tool used to create the official memory of ethnic groups, nations and states. It is mostly based on historical memory, regarded as the only correct one, and used by the currently ruling politicians as a an instrument of indoctrinating the society. Without considering the intercultural context of the society, the politics of memory may become a dangerous tool of assimilation. The degree to which the tasks of intercultural education can be carried out, including the development of intercultural competence, is affected by different institutions: state authorities, political parties holding power in the country, local self-governments, educational policy, and media – free or dependent on political influences.

## **Development of intercultural communication competence**

Intercultural competence is the core of resources for intercultural communication, whose aim, according to Mirosław Sobecki (Sobecki, 2016, p. 158), is to understand diversity, to acquire the skills of interaction through dialogue, and to develop group identity. The role of intercultural education is to prepare individuals to communicate in an intercultural society.

The development of intercultural competence, defined by Katarzyna Gajek (2011, pp. 205–218) as the ability to work effectively at the junction of different cultures, is necessary for talking about what makes us different from others and what we share with them, about tolerance, discrimination and cooperation. The author points out that it includes the person's scope of knowledge and practical skills concerning the disposition to make appropriate communication decisions in relationships with people from other cultures. Intercultural competence teaches communication principles and is needed to better understand oneself and others. We develop the competence in order to be able to establish and deepen interpersonal relations, to build a satisfying life, and to avoid using stereotypes and prejudice in our behavior, so that other people could feel secure with us.

The key importance in developing competence is attributed to school. While analyzing competencies desired in educational activities, Aneta Rogalska-Marasińska suggests approaching them as the categories of human activity which: "are connected (in practical implementations) and associated (in theoretical considerations) with the ability to control and/or cope with complex life or professional situations. To find the best solutions, we need the ability to use various kinds of information, freely draw on our own knowledge, and adequately use the acquired skills. It is also connected with the desire, need and engagement in our own development" (Rogalska-Marasińska, 2017, p. 370).

The psychological and pedagogical trend highlights such attributes of competence as self-awareness, the awareness of the goals and consequences of our activities, and responsibility for them. According to Maria Czerepaniak-Walczak, intercultural competence is effectively acquired if the person achieves three elements: the ability to behave adequately, the awareness of the goals of their behavior, and taking the responsibility for the effects of their behavior (Czerepaniak-Walczak 1995, p. 137). The author stresses the aspect of personality dispositions combined with social mechanisms.

## **Methodological assumptions of the research into the development of intercultural communication competence**

The analyses presented in the text refer to a study carried out in 2013 with participation of general secondary school students from Poland and Israel (the analyses presented herein are a fragment of a broader study carried out as part of the doctoral dissertation supervised by Mirosław Sobiecki, professor of the University of Białystok, on the subject: The memory of the past of Białystok as a part of the collective identity of high school students from the perspective of intercultural education. Comparative studies. The study was conducted in secondary schools in Białystok and in the Kiriati Białystok district in the town of Yehud, Israel. This place was chosen due to its history: it was a residential area established by Białystok Jews who came to Israel after WWII, with the use of funds of people of Jewish origin who had been born in Białystok but lived all over the world. The diagnostic poll method was used in the research. The respondents were 260 students from four general secondary schools in Białystok and 71 students from the high school in Kiriati Białystok in Yehud, Israel. The sampling was both purposive and random. The choice of the number of respondents depended on the size of the towns where the study was done. The population of Białystok is estimated at 300 thousand residents, and Yehud, at 35 thousand residents. In Yehud there is only one high school located in the Kiriati Białystok district, attended by approx. 1,800 students.

The study in Białystok schools was conducted during a single lesson and was anonymous. I personally instructed the students before they began to complete the questionnaires. The study in the Mekif Yehud High School in Israel was conducted with the support from teachers appointed by the management of that school. It was also anonymous and was conducted during a single lesson. I was in touch by mail and by phone with the management of the Yehud school and the appointed person, whom I instructed regarding the proper procedure of carrying out the research among the students. That teacher instructed the students before they began to complete the questionnaires. The feedback after the study in Mekif Yehud school included information about the atmosphere in which the study was conducted. The atmosphere was considered good.

The analysis of intercultural competence of the students was carried out using the model of competence dimensions proposed by Gersten Russell,

who identified the cognitive, emotional and communicative/behavioral components (Bem, 2017, p. 305).

### **The cognitive component of intercultural competence: high school students' knowledge of the social structure of Białystok before the war**

In the cognitive area, the goal of didactic measures is to learn cultural norms and standards. The basis for this learning is the acquisition of knowledge about ourselves and our own culture, because we need to understand ourselves first before we understand others. At the cognitive level, students' knowledge is extended with issues concerning universal aspects of culture and issues connected with the specificity of particular cultures.

It was an important part of my research to find out what students from Poland and Israel know about the social structure of pre-war Białystok. I assumed that the awareness of the past of their ancestors will be the evidence of interest in their roots, but also an inspiration to broaden the knowledge about themselves, their preferences, ways of communication and values they uphold.

In the beginning, I analyzed the students' declared associations with the social structure and intergroup relations in Białystok before the war. The knowledge of the character of the pre-war society in the town was tested on the basis of the answers to the question: *Do you think Białystok was a typically Polish town before the war?* This question was the first stage of studying intercultural competence in the cognitive aspect. In the subsequent stages, the students' knowledge was examined in detail using open-ended questions, in which I asked them to provide any associations with the places, people, events, traditions and names characteristic of pre-war Białystok. The next stage involved highlighting signs typical of the town's history. I asked them to provide their associations and use a scale to show their attitude to particular objects, which allowed me to analyze the students' emotional engagement and attitudes. In this article I will only describe the preliminary analysis of the knowledge evidenced by the answers to the question concerning the social structure of Białystok before the war. The students could choose one of the three responses: yes, no, hard to say. They could also explain the reasons why pre-war Białystok can be described as typically Polish or not. In light of the research assumptions, the diagnostically correct answer was "no", because Białystok has always been a borderland, multicultural town. Therefore, I considered this response as correct.

The analysis of data concerning the respondents' knowledge on the social structure before the war shows that nearly half the students from Poland know that Białystok at that time was not a typically Polish town. Only less than 15% students from this group claim that in the past, Białystok had a typically Polish character.

It is different in the group of students from Israel. The belief that Białystok was a typically Polish town is shared by approx. 32% respondents, and is twice as common as the opinion that it was not typically Polish (approx. 15% respondents). In this group of students the most frequent response is that it is hard to answer this question.

The students from Poland expressing the belief that Białystok before the war was not a typically Polish town explain this conviction with the political situation of Białystok throughout the history: *it has never been typically Polish, because it lies near the border, which changed many times in history (female, grade 3, VII LO, no. 256); because Białystok was under annexation and it was hard to maintain Polishness (female, grade 1, I LO, no. 72).*

Explaining why Białystok was not a typically Polish town, the students from Polish high schools also referred to the specific social structure resulting from the location of Białystok at a cultural borderland. *Białystok was a melting pot of people from various nationalities, who were either relocated after WWII or died during the war (female, grade 3, VII LO, no. 256); it was not typically Polish because before the war there were 40% Jews here; Białystok was a multicultural town, its residents were Jews, Belarusians, Lithuanians, Tatars, Russians, Ukrainians, and Germans (male, grade 3, V LO, no. 52).* The associations provided by people from this group prove that they have some basic knowledge on the social structure of pre-war Białystok. Hence, it can be concluded that Białystok school students have intercultural competence in the cognitive aspect.

Unlike the Polish students, most respondents from Israel expressed the belief that before the war, Białystok was a primarily Polish town, usually explaining that Białystok was a part of Poland and Polish people dominated there: *yes, because it was in Poland, that's what my teacher says (male, grade 1, MYHS, no. 264); yes, because Białystok is often mentioned when talking about Poland; yes, because mostly Polish people lived there (female, grade 3, MYHS, no. 299).*

Those students from Yehud who expressed the belief that Białystok was not a typically Polish town in the past used arguments showing their knowledge on the shared Polish and Jewish history of the town: *it was not typically*

*Polish, I know that in Białystok there was a big Jewish community and Poles (male, grade 1, MYHS, no. 264).*

It is clear that people from Poland and going to school in Poland are more aware that before the war, Białystok was a town of many cultures, where Jews were a considerable group living beside Poles. They also know that Tatars, Ukrainians, Belarusians, Germans and Russians used to live in the town. They explain that this was the result of the town's location at the cultural borderland. The students from Kiriat Bialystok, however, found it hard to describe the social structure of Białystok in the past, which results from the insufficient theoretical knowledge on this subject but also from deficits of practical knowledge, i.e., experience. This shows some deficits in the cognitive aspect of intercultural competence. Only 15% students from Israel mention the shared history of Poles and Jews.

**The affective/motivational/emotional component:  
the reasons why students think it is worth learning about  
the life of pre-war residents of Białystok**

At the affective level, called the motivational or emotional component of competence development, it is important to learn the skills of coping with emotions. The goal is to enhance the competence to consciously recognize emotional states we experience in intercultural contacts to be able to expand our self-observation competence, develop internal motivation, courage and curiosity needed in communication with others.

At this stage of the diagnosis, it was vital to identify the factors of inspiration and motivation of high school students to learn about the past. I assumed that taking into consideration the emotional and cognitive needs of students in this regard will make the educational activities more effective. With a view to planning activities related to intercultural communication aimed at building cooperation between youth from Poland and Israel, I investigated the students' declared motives for gaining knowledge on the life of pre-war Białystok residents. The diagnostic questions were: Do you think contemporary people should learn about the lives of pre-war Białystok residents? What makes you interested in the past/history of Białystok, and to what extent?

In the course of the analysis, I identified five characteristic groups of reasons why the students think it is worth learning about the history of Białystok and its residents. The first group of motivational factors mentioned by the



respondents from Poland and Israel involved the belief that history is a value in itself.

An important subcategory in this group of motivations for displaying interest in history consisted of the responses showing that learning about the lives of pre-war residents of Białystok is an opportunity to gain historical knowledge. Knowledge was perceived by these respondents as a value, which allowed them to satisfy their cognitive needs. Students from Białystok and from Yehud also declared that the exploration of pre-war history of Białystok residents is important because it gives them insight into their cultural heritage. Knowledge about the past satisfies the orientation needs of this group of respondents, especially those related to the formation of awareness of their own culture. Another source of motivation for gaining knowledge about the history is connected with the acquisition of culture and its transfer between generations. The respondents from Poland and Israel explained that it was worth learning about the history of Białystok people because they can share that knowledge with the future generations. And this is important for keeping the continuity of culture. The students from this group pointed out that learning about the history of pre-war Białystok people satisfies their need for a purpose in life and the sense of cultural continuity.

Another subcategory of motivations for learning about the history of Białystok residents before the war is to be able to understand and explain the past. Acquiring knowledge on the past history of those people is a way to understand better the world destroyed during World War II. Learning the stories of Białystok people born before the war allows to understand and explain what happened during the Shoah and to realize what the following generations have lost because of the Holocaust. The responses in this area provide the basis for concluding that knowledge about the history allows young people to satisfy their needs connected with understanding and explaining events from the past. There were also reflections that learning about the life of pre-war residents of Białystok makes it possible to keep the memory of the past. The students stressed that memory is a value in itself.

The second group of motivations for learning about the history of pre-war Białystok residents is the same place of living / the community of life of pre-war and contemporary Białystok people. In this group of reasons, the place of residence is perceived as a cognitive value and the reason for learning about the past. When analyzing the responses of students from Poland and Israel, I identified two categories of reasons why the users of a certain place are obliged to learn about its history. Their responses were a proof that

they felt they had relations at various levels with the place of residence or origin.

The students' declared the reasons why it is worth learning about the town's history are that they feel obliged to acquire knowledge and to remember about the past of the place of their residence or origin. In this case, identification with the place is not of key importance, because according to the students, all the residents are obliged to gain knowledge about the place, even if they do not feel any bond with the place they live in. Another area of motivations for extending knowledge about the past of Białystok people is students' identifying with the place of residence or origin, which stimulates them to learn about that history.

The third group of motivations mentioned by the respondents for interest in the life of Białystok residents before the war included statements that knowledge about history helps in building a regional community. In addition, it supports the formation of patriotic attitudes, strengthens social bonds, and promotes relations with the private homeland. The young people stressed the needs of belonging and security. They wrote that knowledge about the past allows the contemporary generations to build a patriotic attitude and a relationship with their private homelands.

The other reasons why they think it is worth learning about the past of Białystok people are the opportunities to develop and strengthen social bonds. Knowledge about the past stimulates social awareness. According to the respondents from this group, knowledge about the history of Białystok people allows to build a relationship with the town and the people. The students also mentioned that knowledge about the past and memory of the previous generations is a tribute to Białystok people.

The fourth group of motivations for learning the stories of life of pre-war Białystok residents comprises the respondents' statements that history works as a guide to our times. The students highlight the needs related to orientation in the environment and the need of a purpose in life. The respondents from this group argue that knowledge about the past gives them an orientation in the present. It allows them to understand the contemporary reality, history is a source of knowledge on how to live in our times. In this area there were opinions that knowledge about the past is important because it adds value to the present. Young people, both from Poland and from Israel, also wrote that the information on events from the past of Białystok people is significant because the past is a source of knowledge on how to create and explain the present.

The statements of Polish and Israeli respondents, making the fifth group of motivations for exploring the past, proved that the knowledge of the his-

tory of pre-war Białystok residents helps develop the sense of their own identity. Knowing the past makes it possible to build social and individual identity. It provides the answers to some existential questions: Where do I come from? Who am I? Where am I going? According to the respondents, awareness of the past contributes to humans' value. Remembering about our loved ones and their world is important to maintain the continuity of identity. The students pointed to the needs of self-actualization, self-awareness, respect and recognition, and the need of a purpose in life. They declared that learning about pre-war Białystok residents has a cognitive value, because it allows to learn about their own families. In addition, the source of motivation of students from Israel is the belief that knowing the history is people's obligation to their ancestors.

**The behavioral component: developing communication skills. Declarations of secondary school students from Poland and Israel regarding their willingness to have contacts with each other**

The third level of acquiring competence is the development of particular skills as part of the communicative/behavioral component. The work in this area aims to change the indifferent, submissive or aggressive behaviors toward people from other cultures into constructive, assertive and peaceful ones. The development of proper cultural behaviors is possible thanks to participation in rituals, rites, daily social situations, and physical contact with the artefacts of culture.

When planning educational activities in intercultural communication with the participation of Poles and Jews, I assumed that apart from the diagnosis of their knowledge and their attitude to history, it was necessary to focus as well on whether young people from Białystok and Kiriatic Białystok expressed the need to establish mutual contacts. The diagnostic question in that area was: Would you like to have contacts with young Jewish people living in Kiriatic Białystok in Israel / with young people living in Białystok?

The respondents from both countries declared that in their opinion, it is worth learning about the heritage of the other group, so it is surprising that as many as 42.3% respondents from Poland admitted they could not see any need to communicate with youths living in Kiriatic Białystok in Israel. On the other hand, most of the respondents from the Mekif Yehud High School declared the desire to meet their peers from schools in Białystok (45.07%).

Learning about another culture and practicing new skills as part of the behavioral component is difficult if the students from Poland declare the lack of motivation to communicate with students from Israel.

Apparently, the frequency of trips abroad does not impact the readiness for intercultural contacts. As we can see from the analysis, the respondents from Poland traveled abroad more or less as often as their peers from Israel. In both cases, the reason was usually to go on vacation, less often to visit family or friends, to study, or to work. The basic difference was in the countries the two groups of students visited. Polish students most often traveled to European countries. Locations on other continents were mentioned much less frequently. None of the respondents from Białystok declared visiting Israel. Those from Israel, however, tend to travel all over the world. Each of them has been to Poland, too.

To sum up, traveling for tourist reasons is evidently not enough to build cognitive curiosity reflected in the desire to establish intercultural contacts, including the learning of new behaviors and cultural skills. It is interesting that Białystok students have never been to Israel or met its citizens so far. To the contrary, many of the respondents from Yehud have visited Poland, though these were usually organized trips to see the places of extermination, not to meet living people. Thus, the students from Israel also had limited opportunities to establish contacts with Polish youths and learn the Polish culture in the process of communication.

## **Conclusions**

The presented diagnosis of competence may be helpful in planning activities related to intercultural communication, especially in extending the educational offer proposed at the meetings of young people from Białystok and Yehud. Finding out what the youngest generations know was also important in order to discover what they do not know, what has been hidden from them. It was key to find out the youths' attitude to the history: both Poles and Jews can see the need to learn what happened in the past. Many students are aware of how important for their identity is what happened to their ancestors. However, the declared readiness to take actions, engage in behaviors and intercultural contacts is very low, especially in the case of Polish students. This is alarming for educationalists specializing in intercultural education and motivates us to examine this problem more deeply. Apparently, students have few opportunities in the educational system to learn about the world by experiencing the places

of remembrance and communicating with their peers from other cultures. This may be the reason for the declared reluctance to meet young people from Israel. Whatever is unknown causes anxiety, which can be best overcome by applying interactive ways of communication.

The key to understanding yourself and identifying your resources and difficulties is to get back to the past and discover how your ancestors lived, what traumas they encountered, and what successes they achieved. It is important to discover both what we know about the previous generations and what we do not know, what has been hidden, forgotten, erased. Anne A. Schutzenberger (2017, pp. 225–226) calls such issues a “hot potato”, shameful, repressed facts, whose revelation may stop the passing of a trauma from generation to generation. Actually, the unwanted, shameful past does not disappear but comes back in the form of a spectrum of fears, diseases, anxieties and phobias in the following generations (Schutzenberger, 2017, pp. 51–52). Talking about the history of the family and locality and learning the broader context of the history of previous generations, what was going on in the country and all over the world, will reveal the hidden mysteries. This way we can stop the circle of a cultural trauma (Aleksander, 2010, p. 195), and we will no longer be under the influence of “family loyalty”, which is understood as unconscious consent to inheriting the trauma.

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## **The whole child approach in the context of joint activities with children from a migration background**

**Abstract:** The article presents contemporary views on a new approach to children studies in social sciences and humanities, and particularly the “whole child approach” paradigm. The basic features of this approach are discussed in the context of integrating children from a migration background and their social functioning within the structure of education. A brief discussion on the necessary structural changes in social life and its adjustment to the needs of children is provided. The whole child approach is promoted as a key element of social cohesion strategies.

**Keywords:** whole child approach, children-centered approach, education of children from a migrant background, migration, intercultural education

### **Introduction**

In recent years, greater interest has been noticed in new research paradigms that – within the formal education framework, and more often outside this framework in the non-formal learning process – pay particular attention to bigger empowerment of a child (Śliwerski, 2001). It is not yet clearly visible in the school structure and functioning or the conduct of other institutions in educational systems, except for a few schools outside the public school network. Nevertheless, it is recognized in research projects conducted in Polish educational institutions. Academics had become though leaders of an inevitable turn towards more subjective and holistic approaches to school students as humans or more precisely nowadays partners of research and recognizing them as equal individuals in social relations. Such an approach is connected to the belief that children are the future in society and all deficiencies suffered in childhood may affect adult functioning and therefore disturb social cohesion. Social cohesion itself, understood as connectedness and solidarity among groups in society, is an essential part of modern society respecting the rights of individuals. As the Council of Europe maintains, in

an unstable world which is challenging traditional schemes of social bonding, the idea of social cohesion acquires greater importance in responding to people's needs for personal development and their connection with a fair and sustainable society (Council of Europe, 2005, p. 15). Empowerment of children shall serve the building of a better society.

### **Development of holistic children studies**

In Poland, there is a long tradition of giving children the rights to be fully-fledged partners in all relations within the educational system. The roots of this lie in the work of Janusz Korczak (Odroważ-Coates, 2018, p. 19). As Bogusław Śliwierski highlights: "Korczak, as one of few educators in the world, was able to demystify in practice mutual relations between adults and children; ensuring the conditions of real equality; enforcing coexistence based on dialogue and authentic self-management" (Śliwierski, 2017, p. 56). The preaching of John Paul II strengthened the fast development of so-called personalized pedagogy which concentrates on personal relations between the student and teacher (Chrobak and Frejusz, 2018, p. 226). The increase of interest in the research paradigm within the field of education that focused on the child as an object of intervention empowering them with subjectivity is demonstrated by the rising number of research and innovation initiatives that are child-centered by design. What is worth mentioning are the MiCREATE or Child Up projects conducted between 2018 and 2022 under the Horizon 2020 EU research and innovation program. Within the basis of this approach lies the assumption that the aim of schooling is the development of citizenship, the ability to ensure full development opportunities of all children within the school or the possibility to grow beyond their capabilities and finally overcome structural and social barriers, especially relating to inequalities and unbalanced access to knowledge

The whole child approach not only puts children at the center of attention of researchers and educational institutions assuming what is in children's best interest but goes much further by analyzing how stakeholders such as family members, educators, intercultural assistants, decision makers, social workers, and other members of society can foster the wellbeing and welfare of children and, in context of this article, foster the integration of children from a migration background and their educational acknowledgment and personal advancement. As it is, the development of five pillars of the whole child approach by the Association for Supervision and Curriculum Develop-



ment – ASCD (formerly the Association for Curriculum Development and Supervision) – an international organization connecting educational experts from 128 countries, can be considered a milestone in the development of this paradigm. Within this concept, it is emphasized that every child in every school or community setting deserves to be kept in good health, safe against any threats, committed towards their surroundings and challenged to seize opportunities. This approach should be implemented into school structures, but also into the policies of the neighborhood or larger communities. In subsequent years, the Association created a support system for families, educators, and local communities for the whole child approach praxis. Several recommendations for the political process have also been developed to prompt a systemic shift in the education paradigm (Association for Supervision and Curriculum Development, 2007).

### **Benefits of the whole child approach for migrant children**

Actually, the whole child approach paradigm is particularly useful in working with children from migration backgrounds as paying attention to the entire environment surrounding a child including their family, neighborhood, etc. can significantly and positively affect their integration in the host society. Presently, in the absence of state planned and implemented integration activities in the provinces, and with the exception of NGO activities limited most often to large cities, the adoption of the new paradigm, which provides a holistic analysis of the child as a person, is particularly important (Kościółek, 2020). Recent studies show how students with migration experience can take advantage of the whole child approach, which takes a more holistic approach to education, not only focusing on their school progress and cognitive skills, but also on children's extracurricular social functioning and emotional development. It has been revealed that students can be strongly involved in the learning process, achieve goals set by the school in accordance with its values, develop social skills, actively engage in school and local community life, and, finally, achieve educational success, whenever they evolve not only knowledge acquisition skills, but also when children are allowed to blossom emotionally, psychologically and physically (Hamilton, 2013; Krachman, LaRocca and Gabrieli, 2018).

All students should have access to high-quality and inclusive education that prepares them for their future living in the host society. As it is emphasized: “The education system resembles the immigration system as both of

them are strongly influenced by the meritocratic principles of achievement and selection in terms of social adjustment or mismatch, creating a similar interpretive framework for the social rules of belonging and membership” (Albański, 2020, p. 148). The method of assessing progress in the Polish education system as well as the knowledge acquired by children from a migration background does not correspond with the multicultural environment of the contemporary schools as they still do not notice and acknowledge the diversity of students. Polish traditional schools also forfeit the unique skills of migrant children, especially those gained in other educational systems, deriving from their cultural background or related to multilingualism.

In Poland, children from a migration background are constantly being marginalized, however, children who are returnees, despite their citizenship are ignored by the system (Bulandra, Kościótek, Majcher-Legawiec, Pamuła-Behrens and Szymańska, 2019). This makes implementing an approach that considers the child as a whole, including their past experiences, their new relations established in the host society, and the possible impact of external stakeholders, so much more important. Paying attention to the clusters closest to a child, such as the family, can help in integrating them into the new community. There is no doubt that parents play one of the most important roles in the education of their children encouraging or discouraging them in their learning achievements but also creating a communicative channel between the school and its students. The facilitation of parents’ involvement may help children in the adaptation process. This is particularly important as migrations in Poland are predominantly economic ones and parents of children residing in Poland reserve little time for their children as work consumes most of their daily activities. For that reason, it is indispensable to affirm the role of other members of the family, creating connections with neighbours or setting up peer relations. Grandparents, if they migrate along with their grandchildren, are often underestimated as facilitators of children’s feelings of safety or maintaining language and tradition (Hennel-Brzozowska, 2019). Another important factor concerns the active involvement of local communities in the school life of both the institution and children, as it is told: “When schools and their communities work together, their resources are used most effectively and the needs of the entire community can be identified and met more cost-effectively” (Lewallen, Hunt, Potts-Datema, Zaza and Giles, 2015, p. 736). The whole child approach was created and developed in the USA, but in recent years it is practiced in numerous countries, particularly and intensively in Europe. The author hereof is happy that the

Horizon 2020 program project was implemented in Poland in 2021. One of its basic methodological assumptions is in fact the whole child approach. The new ABC – Networking the Educational World: Across Boundaries for Community-building – is managed by the University of Bologna; in Poland it is implemented by the Interkulturalni PL Association in Kraków (European Commission).

### **Problems in implementation of the approach in the Polish context**

It should be highlighted that the mental and physical health of children is one of the most important indicators of the whole child approach, although often ignored in practice. It has been demonstrated that only healthy children are predisposed to educational success without additional support or counselling. This is particularly important in the Polish context where health or dental care is not accessible to most children in the school building. There are also only a few schools that employ psychologists or other counsellors who speak foreign languages and can communicate with children who are at the beginning of the adaptation process and have no advanced language abilities. Such a situation is always stressful and requires an adequate response from support services. Despite the fact that the public discussion on gaps in psychiatric and psychological healthcare for children has been ongoing for many years now, it has not brought expected results, and child psychiatry is still underfunded and lacks personnel. Paying significant attention to children's health in this paradigm is key and there has been shifting potential at the political level. This desire was elaborated on in a joint report by the ASCD and US Center for Disease Control and Prevention (CDC) in 2015. The authors of the report even claimed that “previous approaches did not explicitly describe the critical role of day-to-day practices and processes or the essential role of policy in sustaining a school environment that supports both health and learning” (Lewallen, Hunt, Potts-Datema, Zaza and Giles, 2015, p. 730).

Contemporary education systems, including the Polish one, are strongly rooted in the traditional teaching practices of reading, writing, mathematics and other “key subjects”. Such an approach to education does not translate directly into achieving success in future life. The contemporary, dynamically-developing and unstable world requires a new and better paradigm of educational practices, such as a whole child approach that covers education and more importantly the involvement of the local community in the process

itself. The social change to abandon standardized testing and to comprehend teaching and learning as a more holistic task is not easy to engineer and will require political will. However, as it is stated: “There is a growing appreciation of the need to teach and help the development of the whole person as opposed to merely focusing on academic achievement and test scores” (Slade and Griffith, 2013, p. 24). The only effective education systems to last are those that adapt to the demands of the present, focus on the development of children’s creativity, problem-solving skills, and facilitate cooperation through a personalized approach to students, also depart from the standardization of educational achievement, in which children are forced to memorize large amounts of useless information and have their educational success measured only through tests and exams. Such a change is especially important for children from a migration experience. The present curriculum rarely encompasses their needs and does not take into account language barriers, nor their past, often significantly different educational experiences and possible problems with integration in the host environment (Liew and McTigue, 2010, p. 466). Another problem stems from cultural schemes of education, often driven by prejudice, ethnocentrism and cultural abuse, affecting children with different cultural backgrounds and diminishing their self-confidence and sense of security. It is extremely difficult to change the historical narrative included in the school curriculum, however, it is possible in joint learning projects conducted by peers. In such a method, concurring narratives can provide a sense of dialogue. In the MiCREATE project, one of the most important postulates made by teachers and experts was adhering to team work as a basic type of learning in class (Bulandra, Kościółek and Legawiec, 2019, p. 29).

The whole child approach gives special attention to the role of the teacher as a profession of public trust, in which teachers takes responsibility for the future of the children under their care. As emphasized, teachers should be able “to teach in congruence with their moral purpose, i.e. so that students would understand and learn to promote their personal development and growth, not only for favorable exam scores or other externally set conditions of progress” (Sahlberg, 2010:49). No doubt teachers play a clear role in building social capital in local communities, so it is worth supporting them in activities aimed at a personalized approach to school children and a holistic view of their functioning at school and within the local environment. Relationships established between teachers, parents and other members of the community should be based on mutual responsibility and trust (Sahlberg, 2007).

Considering the connections between the whole child approach and services focused on children from a migration background, it might be said that such children are cross-discriminated in a double exclusion process: firstly, because they are children, and secondly, because they are migrants. As children, they are treated as adults' objects of concern, they are denied personal autonomy, and their cultural, linguistic, ethnic, religious, etc. diversity can be assessed as a barrier in education or upbringing frames, both at school and, more broadly, in the local community. The child's perspective is often overlooked in migration and integration discourse, and as a result children become invisible and are not recognized as causative entities. As it is emphasized: "This is caused by the belief that is rooted in the typical view of the child and childhood that – regardless of the circumstances of migration – the child's situation is similar, i.e. they are in a position of dependence on the adult guardian" (Albański, 2020, p. 12).

## Conclusions

This false narration is increasingly dynamically challenged in the contemporary social sciences. In child research, emphasis is given to the recognition of children's voices and views analyzed from a perspective that is not adult-centric anymore. In this sense, researchers must consider all issues straightforward, without paternalism and re-enactment. One of the most innovative research projects conducted in this century under the Horizon 2020 EU program are following this path. In the MiCREATE project, researchers are trying to learn from children their aspirations and voices to create better educational solutions and opportunities, crafted specifically for these children's needs. All these solutions need to be flexible enough to serve all children, also those who will come next.

The contemporary approach to child studies showed a substantive shift in the methodology and objectives of the research. There are no presumptions or imposed theses that need to be verified by traditional scientific methods. They are superseded by carefully designed activities concerned with involving children in the process, letting them speak out and show their aspirations. With this knowledge, practical solutions are designed to facilitate aforementioned social cohesion through consultation with children and other relevant stakeholders. Innovative models of research are introduced, such as co-creation methods or PAR paradigm. Children become equal citizens that need to be heard as it is the future that belongs to them. In migration studies, such

an approach is particularly important as most children do not migrate voluntarily, however they often integrate faster and deeper than their parents. If they come across modern and effective support services which know how to challenge them, it will be an unprecedented opportunity to create equal chances for them to enter their adolescence and adult life with the full use of personal capabilities. Every child's success is worth all of our research effort in order to make it feasible as this allows us all to prevent social problems, pathologies, and inequalities.

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ARLETA SUWALSKA

## **The roots of educational changes in the perspective of democracy challenges in Finland and England in the 20<sup>th</sup> century**

**Abstract:** This article presents Finnish educational changes in the context of The Nordic Model of Social Democracy improved since 1963 versus English model of Neoliberal Democracy based on conservatism since 1979 with its roots in the late eighteenth century in Europe. The reform of education in Finland was supported by a new curriculum and different methods of teaching. In 1963 students started to have an access to the highest-quality education and it was not related to students' place of living, richness or annual income.

On the other side in England, privatization and centralization were the main pillars of the reform with neoliberalism, neoconservatism and its market competition in education. The central government was responsible for the provision of educational services, educational policy, and planning the direction of the educational system. Teachers faced an ultimatum: "either submit to re-education or lose your job" (Jones, p. 43). The 1988 reform strengthened the ideological control of education and accelerated differentiation between schools.

**Keywords:** roots of educational changes, neoliberalism, neoconservatism, The Nordic Model of Social Democracy, educational change, equity in education

### **Introduction**

This article presents Finnish educational changes in the context of The Nordic Model of Social Democracy improved since 1963 versus English model of Neoliberal Democracy based on conservatism since 1979 with its roots in the late eighteenth century in Europe. My one week stay in London in 2013 enabled me to use library collections of the University of London (Department of Education), London School of Economics and Political Science (LSE) and the British Library in London but also to compare these materials to library sources of the University of Eastern Finland, which I visited within Erasmus Programme in 2017.

## **The Nordic Model of Social Democracy**

The roots of the Finnish welfare state so called the golden years of social democracy were present in Finland from 1945 till 1970. The Nordic model was exceptionally homogenous in its ethnic, linguistic and cultural circumstances. The Finnish population also profited from having a language with many features and having predominantly an Evangelical-Lutheran state. Finland put an emphasis on sobriety, puritanism and an awareness of right and wrong, which were the factors and precursors of the welfare state (Sejersted, 2005). A cultural consensus in Finland was based on the preservation of national identities “at a time when there was a rapid growth in industrial capitalism” (Sejersted, 2004; Slagstad, 1998). In the context of Nordic pension policies, Kari Salminen claimed that the Agrarian Party, between 1950s and 1960s, worked for the “citizenship model” with the Communists. They wanted centralized administration for financing the combining of the pay-as-you-go system and the state.

The Nordic Model of Social Democracy helps understand pragmatic aspects of professional teacher development in Finland. The first educational reform in Finnish educational system started in November 1963, but the Parliament approved the 1968 School System Act a bit later. The Finnish teachers were asked how to reform the system of education. Moreover, there were asked questions how to unify the old educational system into the new one.

On the other side, the Finnish old class society started to collapse between the 1960s and 1970s. The youth generation attacked traditional Finnish values like home, religion and fatherland. The young generation of the 1960s wanted democratization of education in Finland. The Finnish society had the main aim to change education into prosperous one. Scandinavian countries, among them Finland, have been cheerfully involved in the development of social security of all citizens. These countries introduced “dynamic economy with small wage differences” (Brandal, Bratberg and Thorsen, 2013, p. 11) and this model is almost totally resilient to changes in the economical situation of the country.

The Nordic countries have prepared the social democratic compromise which offered them equal protection against the communist and the fascist threat. It was named as a pragmatic and unique project which was treated as a model for the world (Sejersted, 2005; Slagstad, 2004). Finland, as other Nordic countries, chose the compromise named as “one of mankind’s greatest

discoveries” (Slagstad, 2004, p. 229). This solution overcame capital and labour tensions, find out how to bring together the freemarket and centralised planning, and the daily tensions between various classes in society (Aasen, 1999).

In Finland consequently, the left wing political parties accepted a moderate form of capitalism or market orientation, “while the right wing supported the ambition of full employment, Keynesian economic policy with a strong welfare state, and the rights of workers’ organisations” (Telhauga, Medias and Aasen, 2006, p. 245). The biggest reform of Finnish education started in November 1963 during the period of a rapid migration of villagers to the city centers. The Agrarian Party and the left wing parties prepared the new rules in education. The Finnish society wanted effective education for all students and the education reform was positively perceived by them. During the first phase of the reform previous teacher-centered methods of teaching were criticized. Since retirement of older teachers, the introduced educational reform has been accepted by society and teachers. Finland eliminated the system of external inspection and introduced procedures to improve the quality of teachers’ work. The Finnish education policy is appreciated because of high-trust to teachers’ job. Anthony Giddens claimed that: „Trust may be defined as confidence in the reliability of a person or system, regarding a given set of outcomes or events, where that confidence expresses a faith in the probability or love of another, or in the correctness of abstract principle” (Giddens, 1990, p. 34).

The reform of education was supported by a new curriculum and different methods of teaching. Moreover, students started to have an access to the highest-quality education and it was not related to students’ place of living, richness or annual income. In Finland “equity means having a socially fair and inclusive education system that provides everyone with the opportunity to fulfil their intentions and dreams through education” (Sahlberg, 2015, p. 44).

Schools have become an element of the welfare state in Finland and it makes sense to mention the first – economic or instrumental objective in Nordic countries, depending on the foundation that there was an association between the level of education and economic growth (Aasen, 1999). Supporters of the comprehensive school system also underline that this form of school organisation helped find out any hidden talent and created the best opportunity to work as an effective “head-hunter”. The social element was perceived as the second objective and as the main both for the comprehensive school system and for the heyday of social democracy.

The Nordic Model is based on a combination of collective risk sharing and openness to globalization. There is cooperative interaction between two factors: collective risk sharing which helps make globalization “acceptable to citizens, by facilitating adjustments that allow the economy to benefit from changing markets and to raise productivity and incomes” (Andersen, et al., 2007, p. 14). The Nordics created the market economy with the usage of the egalitarian ambitions of the welfare state and successful competition. Finnish society is characterised by the social trust together with security and flexibility not only among citizens, but in public institutions, too.

Finns remade educational theoretical and methodological roots of education and introduced the new rules in the concept of learning and of knowledge. Consequently, Finns gave an introduction into equity in education and developed an equal educational capacity for all students to motivate them to finish secondary education. The equality of educational opportunity means the same opportunity to complete the comprehensive school for children and adolescents regardless of their place of living, gender and social status.

### **The roots of English conservatism and its perspectives in education**

Conservative ideas appeared as a reaction to social and economic changes in the late eighteenth and early nineteenth centuries in Europe. Conservative thought defended the traditional social order and was against liberalism, socialism, and nationalism. Conservative doctrine was found on the principle of hierarchy and the assumption that equality among people does not exist. Consequently, “conservatives divide society into classes and categories, which depend on abilities, skills, and social origin” (Suwalska, 2017, p. 37). As a result, conservatives affect the right of a social group to raise the young generation and advocate the rule of law, a strong state, and a free market.

In the light of the conservative doctrine, political leaders “are responsible for ensuring the integrity of traditional institutions and the preservation of existing social patterns. If they introduce social or educational changes, they implement them gradually. Such changes are usually few and involve elements which do not impact tradition”(Suwalska, 2017, p. 37). According to conservatives, people deprived of the past and their roots feel lost. The cultural context reflects the social experience of centuries and the continuous transformation of the modern world, especially in literature, history, and the national language. Thus the main theme of conservatism is the role of tradi-

tion, which contributes to the continuity of cultural heritage, passed down from generation to generation, and maintains the society.

It seems necessary to mention that the main role of the conservative school is to acquaint a young man with the achievements of previous eras and instill membership in a particular social class. The student is obliged to understand cultural values, develops appropriate behaviour, and respects social norms. The school teaches about membership in social classes and the resulting work, wages, and vision of the past. As a result the roles of church, family, and school are perceived highly as values of conservatives. Some secondary schools in England (such as Eton, Rugby and Harrow) build and educate the future leaders of the political elite, who then successfully study at the universities of Oxford and Cambridge and have the opportunity to work in elite positions. The English elite is characterized by high intellectual abilities and qualities of character. Consequently, conservative assumptions about school do not perceive the possibility of social change. The British society observes “strong ethnocentrism and the strict formation of children’s personalities, together with competition and competitiveness at each level of education” (Suwalska, 2017, p. 38).

### **The roots of English neoliberalism and its perspective in education**

Liberalism, which started in the era of the Enlightenment in France, developed in Europe in the nineteenth century along with the emerging capitalist society based on the free market. The concept of ideology was developed by French philosophers, who rebelled against absolute monarchy, educational institutions, and dogmas of the Church. They promoted civil rather than religious values, separation of church and state, and the removal of religion from schools. They underlined the secular nature of education, the task of which was the training of qualified workers. The student was at the centre of liberal ideology, which resulted in a new vision of the school. “Laissez-faire capitalism is thus seen as guaranteeing prosperity, upholding individual liberty, and, as this allows individuals to rise and fall according to merit, ensuring social justice” (Heywood, 2002, p. 33).

As a result, “the followers of the liberal conception of property and economy, particularly the principle of laissez-faire, believed that the government was responsible for the creation of conditions for the development of a competitive economy” (Suwalska, 2017, p. 36). Moreover, freedom of trade

must not be limited by the economy control. The state is responsible working times and conditions, taking care of citizens' health, and providing them with public safety.

Dewey and Spencer, who were theoreticians of liberalism, presented different views on the role of the individuals within the group. Dewey rejected competition in favor of cooperation within a group, whereas Spencer believed that education should be related to competition to prepare young people well for their lives. The school designed by the Liberals took into consideration education, utility, and procedures promoting the attainment of the values they announced. Civil duties appeared in place of religious values. Liberals put an emphasis on the significance of cognitive and emotional aspects. "They instilled a sense of public responsibility, and linked careful fulfillment of obligations related to work with their emotional aspect. The fundamental pillar of the cognitive aspect was the dissemination of social awareness regarding state institutions" (Suwalska, 2017, p. 36).

The economy directly influenced education and its development, especially the knowledge and skills necessary to find work regardless of race, ethnicity, or socioeconomic conditions. Consequently, educational policymakers made political decisions with regard to educational policy and programs taking into account centrist tendencies. The principles of liberalism introduced the limits of freedom for teachers and students. Liberals implemented a curriculum which allowed a free choice of profession. Liberal political processes influence the freedom of individuals to make their own choices when electing candidates for public office. This freedom of choice applies to voting for candidates for public office, choosing a college or university, choosing a career, and a range of life options (Guttek, 2009, p. 237).

### **Equality and *peruskoulu* in Finnish education**

Equality means not only the particular rights but duties of people, too (Espinoza, 2007, p. 345) and it is also connected to the power of particular language in the process of building the social reality (Englund, 2005, p. 40). "The notion of equality is not only a tool for linguistic description; it also evaluates and creates different educational realities" (Englund and Quennerstedt, 2008, p. 717). In this light, it makes sense to mention what kind of educational equity phenomenon is represented in the Finnish society. "Because school learning is strongly influenced by children's family background and associated factors, equity of outcomes requires that schools are funded according



to real needs to cope with these inequalities” (Sahlberg, 2015, p. 149). There is an observable relationship “as John Dewey (1916) insisted that educational experience provided the bridge between “self” and society, between self-realization and democratization” (Pinar, 2004, p. 13).

The main idea of *peruskoulu*, was to match existing grammar schools, civic schools, and primary schools into 9-year comprehensive school. All students, regardless of their place of living, socioeconomic situation, or interests would participate in lessons in the same 9-year basic schools led by local education authorities. The people who criticized the new system claimed that it was not easy to create the same educational expectations for children coming from very varied social and intellectual environments.

The National Curriculum for the Comprehensive School managed the content, organization, and ways of teaching in Finland. The structure of comprehensive school was the same for all students in Finland. There were different instructions prepared for different ability groups and personalities. Three levels of study existed in grades 7–9: basic, middle, and advanced in teaching foreign languages and mathematics. The basic study program was related to previously offered programs in civic schools, and the advanced study program was equal to the program of previous grammar schools.

The introduced *peruskoulu* required from teachers who worked in the academic grammar schools or work-oriented civic schools the ability to teach students with different abilities. As Jouni Välijärvi justified the comprehensive school reform was based not only on organizational change but it introduced a new philosophy of education (Välijärvi et al., 2002), which included the statements that all students can learn because of giving them appropriate opportunities and enough support. Finnish schools introduced a relationship which provided the bridge between “self” and society, between self-realization and democratization” (Pinar, 2004, p. 13). In this light, to understand and learn about human diversity is a significant educational goal, for which schools are obliged to function as small-scale democracies, as John Dewey had suggested before. In Deweyan philosophy “democracy will stand or fall with the possibility of maintaining the faith and justifying it by works” (Dewey, 1939/2003, p. 153).

According to Sahlberg (2015, p. 167), it is “understandable that the pragmatic, child-centered educational thinking of John Dewey has been widely accepted among Finnish educators”. In this light, Dewey’s pedagogy is highly related to research-based education of teachers who study in Finnish universities. The main directions of teachers’ professional development in Finland

have been educational theories, research-based teacher education, methodologies and days of teaching practice since the 1970s. Finnish students are obliged to design and implement the most original, exceptional research in theory and in practice of school. Practical training at schools is a main part of the university study of teachers in Finland. According to Sahlberg (2015, p. 117), “all teachers as professionals are able to understand teaching holistically and improve their work continuously”. The key element of research-based teacher education is deep and wide knowledge about the most useful research in their subjects of teaching. They are obliged to understand the theoretical principles of research to introduce them in their classrooms. A research-oriented approach in teaching activities is linked to open-mindedness of teachers and their ability to design conclusions based on different methodological sources used during their lessons. According to A. Suwalska (2018, p. 275), Finnish society „trusts their teachers and heads of schools”. The integral parts of teacher education programs are theory and practice in Finland. Teaching practice involves three main parts: “orientation, intermediate practicum, and advanced practicum, which expand teacher trainees’ responsibilities” (Jyrhämä, 2006). Teacher training schools, which are close to universities, manage students’ practice. They encourage students to work as reflective teachers and critical practitioners. Finnish teachers, who are leaders, prepare their own curriculum which should be accepted by local education authorities. As a result, teachers are authors of needed supervision and regulations which promote success of Finnish students. Teachers do not have to check and test students very often, as it takes place in England and the USA.

### **The roots of educational reform in England**

In March 1976, following the resignation of Prime Minister Harold Wilson and in connection with numerous attacks by the Irish Republican Army, James Callaghan became the Labour Party leader and Prime Minister. However, in the wake of the declining value of the pound sterling against the US dollar the Labour Party lost the elections of May 3, 1979 to the Conservatives. The new leader was the first female Prime Minister Margaret Thatcher, who developed a strong policy. Thatcher strengthened the economic potential of the UK and created a more stable political situation in the country through reducing the scale of taxes and creating conditions for the development of private industry. She sought to strengthen the central government

at the expense of local authorities and there was a conservative revolution in education. The educational policy emerged under the influence of the so-called New Right, brought together educators, philosophers and economists and introduced Kenneth Baker's Law on Education Reform of 1988. The New Right education policy "was supported by the mass media as well as by trusted advisors to the Prime Minister, for whom education reform was one of the main areas of interest" (Suwalska, 2017, p. 94). Michael Apple (1993) characterised these times as a return to conservatism, with an emphasis on private property.

In the 1970s the party paid attention to standards and values in education. They introduced minimum standards. In the opinion of Christopher Patten, education was preparation for a good life; this could be achieved only through education, which consisted of learning virtue. In addition, Keith Joseph developed the term "effective education," meaning education that not only met the needs of academic minds, but enabled the implementation of pre-vocational preparation. New trends in education contributed to conservative educational policy in the area, as K. Jones puts it, of "unabashed selectivity between and within schools" (Jones, 2003, p. 3).

Visible competition among students was supposed to serve as a preparation for future life. Analysis of the neoconservative elements showed that the best summary of the idea of the philosophy of the New Right was the slogan "a free market and a strong state" (Potulicka, 1993, p. 19). The elements of neoconservatism and neoliberalism were united in presented educational concept. A strong state was obliged to defend the interests of the leading elites and limit social resistance. A market with guarantees was a good solution. In Thatcher's England there were not any forms of welfare state and inequalities in access to social benefits were maintained. Professional organizations and trade unions were inhibited, too. According to Clyde Chitty, neoconservatives, as leaders and controllers of social change, had the greatest influence on education policy.

The primary objective of school education, as stated by the members of the Hilgate Group (Caroline Cox, Jessica Douglas-Home, Roger Scruton), was the inculcation of respect for the family, private property, and all of the authorities of the bourgeois state. They spoke of the new individuality created by the New Right as "easily adapting to and being convinced by the reward of individual enterprise" (Śpiewak, 1988, p. 126). During this period, British education experienced the most comprehensive reform since 1944. Education introduced by neoliberals seems to be "adequate education"; it is

minimal and comparable to training. Well-prepared and full education is reserved for only very few children. The New Right, observing “the necessity for education to accommodate the needs of economic life and to support the workforce, returned to the traditional elementary school and expressed opposition to the idea of universal education” (Suwalska, 2017, p. 97). Consequently, these educational changes named as strategy of top-down reform (Śliwerski, 2015, p. 179) limited the compulsory curriculum and modified the role of teachers to the function of contractors, managed by corporations in educational process. The proposed changes in education in England, offered only the basics of education for all. In this light, neoliberalism should not be perceived as the ideal ideological model.

Zbigniew Kwieciński (1997) precisely described this type of educational change as the strategy of the managed epidemic. Consequently, every teacher and student is forced to accept the change introduced by the education authorities. This contributed to an enlargement of the competence of the Minister of Education in educational programs. The Act introduced the concept of “Key Stages,” marking educational stages in the formal assessment of all students at the ages of 7, 11, 14 and 16. A framework for the compulsory program of education for each of the four stages of education was introduced. The curriculum involved balanced spiritual, moral, mental, and physical development. As a result, students were taught in ways based on their needs, ages, and skills. Individual skills and special needs of each student were taken into account. Due to fast changing conditions in the factories and competitive global markets, education was forced to introduce professional orientation of students with the ability to plan and monitor students’ professional future.

The central government was responsible for the provision of educational services, educational policy, and planning the direction of educational system. In this light, the working conditions and employment of teachers were changed, too. Teachers faced an ultimatum: “either submit to re-education or lose your job” (Jones, p. 43). Firstly, one curriculum for the entire country was introduced in England, but then didactic objectives were also prepared for student achievement at specific ages, along with “specific criteria for implementation of the program, which in turn become an integral part of reforms” (Potulicka and Rutkowiak, 2010, p. 27) in the context of school-leaving exams.

Privatization and centralization were the main pillars of the reform with “neoliberalism characterized by market competition in education and neo-

conservatism in the case of centralization” (Potulicka and Rutkowiak, 2010, p. 95). Privatization in educational policy in England promoted private schools through scholarships for students from poor families. Only people from the middle classes could receive scholarships; they were not granted talented children from the families of manual workers. The 1988 reform made stronger the ideological control of education and accelerated differentiation between schools. New curricula and new exams were introduced, which contribute to neoliberal working methods. Moreover, the work, employment, promotion and dismissal of teachers changed. Teachers were treated as technicians who manage the process of teaching.

The new curriculum in England was overloaded with facts that required memorization. There was no time for discussion or students’ doubts. Students studied in the atmosphere of obedience without understanding of concepts, accuracy, and principles. Teachers reduced the development of students’ personality and killed their critical thinking. In corporate ideology, teachers, as “ideological intermediaries, contributed to the emergence of a labor force that enabled efficient management of the production process by financial potentates” (Suwalska, 2017, p. 101).

As Hayek mentions in *The Constitution of Liberty* in the section “Contract work and independent work.” The hardest part is to convince the masses that it is in the common interest “to maintain conditions enabling only a few people to achieve the positions that to the masses seem unattainable” (Potulicka and Rutkowiak, 2012, p. 75).

## **Conclusions**

This article presents the educational change in Finland and in England in the context of roots of democracy challenges in both countries. Finland has built the welfare state democracy with its consequences in Finnish schools. The article confirms that the comprehensive school reform in Finland was based on a new philosophy of education (Väljjarvi et al., 2002) which enables providing students with appropriate opportunities and enough support. The phenomenon of Finnish educational equity is represented in society, especially when students come from varied family backgrounds. As a result, equity of outcomes requires that schools obtain money to cope with these inequalities. In addition, Finland has got rid of the system of external inspection and improves the quality of teachers’ work. Consequently, Finnish society appreciates high-trust to teachers’ job, teachers follow the same values

concerning the vision of education and they use research-oriented approach in their teaching. The high-trust to teachers' job and the highest quality of education are reinforced by collaboration between schools which support culture of cooperation and equity of outcomes in education.

On the other hand, England incorporated neoliberalism, which was described by H.A. Giroux as "a massive attack on equality and justice" (Suwalska, 2017, p. 98). In the 1970s the Conservative party paid attention to standards and values in education. As a result of neoliberal and conservative ideologies, England introduced effective education for rich and lower quality for poor children of workers and peasants. The elements of neoconservatism and neoliberalism were united in the presented educational concept. Furthermore, schools accepted reduction of education expenditure due to free-market educational policy. It led to a growing gap between school-leavers of general and vocational education. New trends in education contributed to conservative educational policy and to the selectivity between and within schools. Due to fast changing conditions in the factories and competitive global markets, education was forced to introduce professional orientation of students with the ability to plan and monitor students' professional future. There will always be inequalities in England in access to education which depend on abilities, talents, and origin.

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URSZULA MARKOWSKA-MANISTA

## **Research “about” and “with” children from diverse cultural backgrounds in Poland – dilemmas and ethical challenges**

**Abstract:** The text refers to contemporary research about children from diverse cultural backgrounds in Polish educational institutions. I reflect on the need to decolonise this research and to sensitise scholars to the ethics of research “about” and “with” children. I argue that this should be oriented towards participation and the right to be properly researched, as postulated by J. Ennew. Ethics is crucial in the search for non-discriminatory research strategies (also in the area of affirmative action) due to the dominating research “about” children rather than “with” children or from the perspective of children. I reflect on research practices with children from diverse cultural backgrounds in Polish schools and preschools. I also draw attention to the ethical need to verify research about this group of children in the light of protecting their rights in a new country, language, education system and new culture. The absence of children’s voices and the prevalence of narrations about them as well as the lack of participatory research with this group of children preclude a deeper insight into their situation and ways of looking at the world. With this article I aim at making children’s voices heard.

**Keywords:** research “about” and “with” children from diverse cultural backgrounds, decolonisation of research “about” and “with” children, intercultural pedagogy, ethics of research “with” and “about” children

### **Introduction**

In this article I argue for the need to look at research “about” and “with” children from diverse cultural backgrounds and decolonise dominant research approaches “about” children in intercultural pedagogy. This involves turning to participatory, engaging approaches, humanising and reflexive methodologies (Alvesson and Skoldberg 2009), which consider children’s subjective, non-discriminatory participation in research that concerns them in the area of intercultural education. These postulates refer to problematic, dominant

adultist power relations in research about migrants (both adults and children) and indicate ethical challenges in this area. They are rooted in the transformations in the lives of children from diverse cultural backgrounds in the face of increasing migration processes. They are also connected with a search for new solutions in academic approaches, design and implementation of research with children defined in literature on the subject as culturally “other” (Lahman 2008) or “distinct”. These postulates were emphasised by the British researcher and activist Judith Ennew in her research with and about children. She argued for the need to conduct rights-based scientific research with children and children’s right to be properly researched (Ennew, Plateau 2005) – i.e. to participate and contribute to the research that concerns them (Ennew 1995).

The discourse of “narration about” minorities within minorities<sup>1</sup> (paradoxically, children are a numerical majority in the global population) and representations of refugee and migrant children’s voices, in other words: talking about them, predominates in intercultural pedagogy. As such it draws attention to the need to decolonise research assumptions (Walsh 2013) so as to eliminate Eurocentric and adultist conceptualisations and approaches, hierarchies, patriarchy and prejudices (Cheney 2018) and to speak on behalf of the subaltern (understood as children) (Spivak 1988). Manfred Liebel holds an opinion that in order to decolonise childhood studies, which he argues are an extension of long-term effects of colonialism, we have to consider them as “attempts to understand postcolonial modernity and its problems” (2017: 184). It is thus a matter of interdisciplinary and holistic thinking about theory, praxis and research as social change, initiated by various groups of actors including children as researchers and co-researchers (Liebel, Markowska-Manista 2017; Twum-Danso 2020, Vandenhole 2020).

It must be added that the decolonisation postulated by Liebel refers to post-dependence and postcolonial studies, emancipation philosophies and theories as well as the epistemology from the South and North with a space for an “alternative viewpoint from the perspective of postcolonial subjects”(Liebel 2017: 183). Decolonisation can show how the centuries-old relations, practices and perceptions reproduced and transformed through adults’ knowledge should be interpreted in the context of the power imbalances and relations (Alcoff 2009) between the colonised subject (children) and researchers.

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<sup>1</sup> Every child has several identities or multiple identities included in the categories of affiliation or rather their classification into minority groups.

This process also enables us to identify dilemmas connected with the character of conducting research related to the situation of children from diverse cultural backgrounds in countries hosting migrants and refugees. At the same time, it allows us to check whether, how and for what purpose “knowledge” (which is not child-centred) about children and childhood, or stereotypes and clichés, were used in research. This process also generates space in which children’s voices rather than merely their reproductions are/will be heard with their consent (Clark, Moss 2001).

### **Children from diverse cultural backgrounds – research subjects of intercultural pedagogy**

In the research discourse of intercultural pedagogy, children from diverse cultural backgrounds are usually identified through the lens of adaptation challenges, identity crisis, linguistic difficulties and school failure. The perception of their parents as Others or Foreigners (accent, appearance, status, affiliation) is another such factor. Due to the great diversity within this group, it cannot be defined as homogenous, however key categories which are usually treated as objects of research can be distinguished. Referring to this group of children in the context of school, intercultural pedagogy researchers use the following terms: students belonging to national and ethnic minorities, re-emigrant students/returnees, refugee students, students from bicultural families, culturally “distinct” students, foreign students, students from migrant groups, children of mixed couples and students with multicultural background.

Definitions describing culturally diverse groups of students seem to cause disorder and be inadequate to the present social reality and international policy. The fact is that Poland is a home to a new generation of young Poles with diverse skin colours, whose parents are migrants or refugees. Young people who were born in Poland, often feel Polish and do not want to be identified as “other”, “distinct” or “foreign”. The same applies to terms describing the phenomena which often serve (in the case of children) to stigmatise rather than describe. These divisive designates refer to (for instance) dark-skinned Poles and their children who, despite having been born in Poland and raised in Polish culture, and despite their identification with Poland as their home country, are treated through the lens of Polish-centrism (Balogun 2020) as foreigners, inauthentic, “not quite” Poles as opposed to “typical” Poles. Admittedly, it is not an exclusively Polish phenomenon. In other West-

ern European countries with a longer history of migration processes, such as Germany, there are still cases of (for example) non-white Germans or non-biologically German people being perceived as foreigners (Foroutan, 2019).

For the purpose of this article I use the term *children from diverse cultural backgrounds* so as not to victimise a particular group of children. I have chosen it also to avoid emphasising those terms which – while defining identity – can be interpreted in a pejorative way (migrant, refugee, foreigner – social constructs). Moreover, this terminology can be oppressive as it expresses deficiency as opposed to the “cohesion” of the dominant social order (Paris 2019: 220). At the same time, I draw attention to the absence of research “with” children in Poland that would enable children and young people from diverse cultural backgrounds to express their opinions about how they would like to be identified and how they perceive the terminology through which they are categorised and described.

When we take a closer look at research “about” children from diverse cultural backgrounds in schools and preschools, we can see several crucial asymmetries and blank spots. Firstly, this research (designed top-down) is based on the discourse of “subaltern others” (Spivak 1988) or is connected with relations of dependence and multiple power. Such approaches signalling the opposition “us” vs. “them” force children from diverse cultural backgrounds into the definition of a “foreigner as an object to become familiar with” (Walczak 2006: 134) and passive recipients of educational and research practices. They concern children who (as “foreign”) are infantilised and associated with psychological and identity-related aspects of lack of agency (Huijsmans, 2011) in social (not pro-migrant or pro-refugee) discourses (Pietrusińska 2020).

Secondly, we can see that the majority of this research is conducted by researchers from the academy and non-governmental organisations in a model based on gathering knowledge “about” children in the situation of increasing cultural diversity in societies. The research is thus done by non-migrants<sup>2</sup>, presenting and reproducing certain representations seen through the eyes of the privileged majority. There are no researchers from migration backgrounds among authors of this research as the discourse is dominated by local (Polish) scholars, myself included. My intent is not to propose a “Copernican revolution”, but to draw attention to how much we lose by not including

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<sup>2</sup> In recent years, there have been individual studies by foreign or Polish scholarship holders or Ph.D. students – researchers from diverse cultural backgrounds.

the perspective of migrants, their critical reflection on the approaches that can have a positive impact on changes desired in integration models.

The virtual absence of migrant/refugee researchers and their work in research relating to children from diverse cultural backgrounds in Poland deprives us of the possibility to verify the approaches and results of such research, and prevents their voices from being heard in the area of intercultural pedagogy. What is more, without these voices, it is difficult to study and understand children and their families from refugee or migrant backgrounds and different cultural contexts in their new reality of a host country. These voices are important however, as they enable us to analyse and show the situation of children through the perspective of their own cultural, linguistic and social context in which they live and will live in the future.

We thus face an image of incomplete research on children from diverse cultural backgrounds in the reality of Polish preschools and schools fitting into an important area of intercultural pedagogy, which is in this dimension, the research which is oriented to a homogenous voice, to the perspective of the majority. It reflects a binary concept of voice and silence defined by Gayatri Spivak in her seminal publication about the voice of the subaltern (1988: 285).

### **The “missing link”: research “with” children**

The dominant, majority-oriented, passive discourse of research “about” children, rather than “with” children or through the perspective of children from diverse cultural backgrounds in Polish schools or preschools, provoked me to write about an approach oriented towards participatory research “with” children<sup>3</sup>. This approach (Alderson & Morrow 2011; Liebel 2017; Nigel & O’kane 1998) is based on the ethics of participatory engagement of young people in the research process (Morrow 2008; Alderson & Morrow 2020; Hopkins 2008). A participatory approach in intercultural pedagogy is oriented towards children’s perspectives. It focuses on a given minority group (children) and is conducted “with”, “by”, and not only “about” this group. It is based on respect for human rights in the process of participating in research, taking a focus on hu-

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<sup>3</sup> It must be noted that this lack of participatory approach in research is a symptom of a broader deficiency of participatory approaches within the society as a whole – so a symptom of disempowerment of children and (frequently) adults as citizens. This kind of attitude is then reflected in research as well.

manising research methodology as Paris & Winn argued in 2014 and ethical symmetry (Christensen & Prout 2002; Markowska-Manista 2018). This way, this type of research meets the “condition of validating groups that were previously unseen in social research” (Wołowicz 2018: 168). Participatory research seems important and socially useful as it provokes a change in research paradigms. Moreover, it opens new areas of understanding the situation of children by (us) adults and children themselves (e.g. a sense of agency). It does so by indicating that we need to change and start thinking about children both as key actors – experts and informants about matters and situations that concern them.

Undertaken within the trend of critical, postcolonial studies in the area of intercultural pedagogy, this research can eliminate the negative phenomena it describes and simultaneously “act” for the groups which are “unheard”, “invisible”, ignored in the dominant social, cultural and political discourse (in other words absent from it, stigmatised or dealt with in a discriminatory way). Children from diverse cultural backgrounds are among such groups. Various scholars draw attention to the specific character of participatory research with children about children’s rights, in which adult researchers should reflexively consider their “epistemological environment” (with reference to potential and expected research results (Nieuwenhuys & Hanson 2020; Liebel 2012; Spyrou 2011, 2018). The scholar believes that this environment cannot be limited to the university (academy) or any other academic institution, but has to encompass children with their different childhoods (Liebel 2020) as well as contexts of their activities in the worlds of their daily lives. As such, this environment is to make research results useful and become a tool for change. Also Feuerherm (2019) argues that research should be useful for the community of research participants and be made available to a broader public.

Only a handful of studies relating to children in schools and preschools in Poland have been conducted in cooperation with non-adult researchers or implemented in cooperation with children and youth. Not many research projects in the area of intercultural pedagogy give children (especially from refugee or migrant background) space to participate. Few of them allow children to articulate their ideas (based on the knowledge of contexts) relating to the ways which can help to develop this type of research and look critically at theory and praxis in accepted models of academic work in the school and preschool environment.

At the same time, making children’s ideas “heard” and treated seriously in academic spaces can be difficult. It is limited by classical approaches to research, “epistemological violence”, the phenomenon of tokenism and the

position of both academic researchers and research objects in the hierarchical structure of power relations. Participatory research “with” children fills the gap and (to a degree) decolonises thinking about children – into treating them as active rather than passive social actors.

To illustrate this approach, let us look at the project: “Counter-stories from Poland: Identities and language identities of adolescent refugee-background students” implemented by A.I. Olszewska in one of Warsaw’s schools. The main method used in this research with children was the so-called human story, to be more exact: a counter-story to the prevalent anti-refugee narrative. Based on humanising methodology, the researcher listened to children and collected their refugee stories and identity portraits in cooperation with the children (Olszewska 2020). The theoretical framework of this study fits into the methodology of counter-narration whose task is to question the dominant discourse describing refugees and create a space for refugee students’ voices (Solórzano & Yosso, 2002).

Another approach can be found in research with children based on Laura Lundy’s model of participation (2007). This approach highlights four factors determining children’s effective participation: space, voice, audience and influence. Space is necessary for children to express their opinions freely and in safe conditions. This voice (as the second factor) needs to be heard – which leads to the third element – the audience. Finally, the audience must be in a position to translate children’s views, needs or demands into practice – that is influence. This influence is a resultant of cooperation not only between children and adults, but also between adults with various opinions (Lundy 2007).

Children’s participation in research is considered to be particularly important. On the other hand, it is also extremely difficult to implement in the case of children from diverse cultural backgrounds. These children do not know the language of the host country or know it at an insufficient level when they arrive, they find themselves in disadvantaged social situations or in a new context of daily life. In such research realities, children can be heard or seen, but they usually do not have influence on what happens to their voices and images (Markowska-Manista 2020). In these conditions, research with children will not meet the ethical principles relating to the protection of children’s rights and ensuring benefits to children as co-researchers.

It must also be noted that children’s participation in research is frequently limited to “symbolic participation” (tokenism) such as consultations, focus groups or fragmentary interviews. It particularly refers to research in which children’s participation involves being informants (respondents), which is

a widespread practice in survey studies<sup>4</sup>. In this case, knowledge provided by children is treated as a resource to be processed by adult experts at their own discretion. Childhood studies researchers argue that this can be counteracted only in situations in which children can participate in all stages of the research process as co-researchers with their own rights and decision-making powers, and can impact the research process up to the stage of result application (Alderson 2008; Punch 2002). However, engaging children as co-researchers has brought new ethical dilemmas and challenges in the case of children in disadvantaged social situations and marginalised children (Markowska-Manista 2018). They result from the fact that adult researchers, especially if they only “visit” the children for the purpose of their field research, simply disappear having completed their studies.

Even if this research aims at allowing us to listen to and see the perspective of children, it will usually be research located on the fourth and fifth level of Roger Hart’s model of participation ladder (1992: 8). Hart indicates that the levels of cooperation with children and youth can be divided into apparent (the first three) and real (the fourth and subsequent) stages. It means that the participation of children from diverse cultural backgrounds in research on matters that concern them is non-existent. Teachers (e.g. through action research), non-governmental organisations, researchers of educational institutions implement and promote children’s active participation in school life, however it is participation initiated and managed by adults rather than child-led participation.

## **Conclusions**

Contemporary discourses about children from diverse cultural backgrounds in Poland are very heterogeneous. They cannot be confined to one discipline of science and compartmentalised to one type of thinking about and research on childhood(s), or one type of research about children and interculturalism. Children are part of preschool and school communities as well as local environments, they live in different contexts: colonial, social, geographical, political, cultural, linguistic and many other. Hence designing new areas of research, for instance advocacy, participation, bottom-up activism, agency and protagonism of children in their own communities, through participatory and action research seems crucial today.

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<sup>4</sup> In these studies all respondents (not only children) are “only” informants.



The application of new theoretical and methodological approaches and the implementation of research not only about children but increasingly more often with or by children based on the ethics of their participatory engagement in the research process opens rarely explored spaces to us as adult researchers. It also provides new ways of looking at, understanding and reinterpreting the situation of children from diverse cultural backgrounds in their new living environments.

These approaches demand considerable efforts in attempts to overcome the frequently stereotypical “obvious truths”. These truths include e.g. schematic patterns in education (Viruru 2005), thought patterns determining research strategies and perspectives on migration and cultural diversity in schools as well as the situation of children from diverse cultural backgrounds in the dominant society. However, redefining and reconceptualising the present paradigms of research “about” children into research “with” and “by” children seems to expose new areas of exploration which are necessary for a holistic view and multi-faceted understanding of children’s situation. The absence of children’s voices and the prevalence of narrations about them as well as lack of participatory research with this group of children preclude a deeper insight into their preschool and school situation and their ways of looking at the world.

It is not only a basic political problem, but also a challenge for the spectrum of ethical principles based on the idea of (individual) self-determination and the idea of dignity of every child as well as social justice already at the stage of preschool and school.

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URSZULA NAMIOTKO

## **Pedagogy of place in the theatrical space. Theatre as a factor in shaping intercultural identity**

*Where you are, a place comes into existence.*  
Rainer Maria Rilke

**Abstract:** The author presents several theoretical approaches to defining place and space in social sciences, placing both categories in the context of the terminology of the pedagogy of place and space in theater. By showing the role of theatrical practices in educating “to” and “through” place, they indicate the convergence of these activities with the assumptions of regional and intercultural education. Referring to the practices of non-professional theaters operating on the border of north-eastern Poland, the author analyses the symbolic potential of this art form as a factor shaping the intercultural identity of young people.

**Keywords:** category of place, identity of a place, place pedagogy, non-professional theatres, intercultural identity, regional and intercultural education

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Both categories – place and space – bring together representatives of many social sciences in the cognitive discourse. These are ambiguous concepts, saturated with connections, the interpretations of which concern various interactions between the physical and social environment and individual mental processes of a person. This text is an attempt to “locate” an individual in the terminology of theater space and space pedagogy, while paying attention to the value of including this “local” in the educational process of forming intercultural identity through theater practice. References to the role of non-professional theaters in bringing up “to” and “through” place indicate the convergence of these activities with the assumptions of regional and intercultural education, the aim of which is multidimensional understanding and cultural embedding in the local community, which is the starting point for meeting and dialogue with the Other and shaping attitude of a reflective, open-minded member of a multicultural community.

### **A place defined by a person, a person defined by a place**

Taking into consideration the broad problem of the relationship between place and person, I would like to focus on two aspects. The first relates to a person as the creator of the identity of a place through their presence. The second aspect concerns attachment to place and the effect it has on the identity of the individual.

The concept of place is one of the main categories of the language of space. It is usually defined by reference to various concepts of space. As the precursor of humanistic geography Yi-Fu Tuan (1987) pointed out, "to define the terms 'space' and 'place' both are needed" (Tuan, 1987, p. 16). According to him, space is a category more abstract than place. A person makes space a place by discovering it and attaching value to it. The key term here is experience, which is the term "all-encompassing" (Tuan, 1987, p. 16) various ways of learning and constructing reality by an individual. Phenomenology had a great influence on humanistic geography. This seems to be justified because the basis of geographical knowledge lies in direct experience and awareness of the world in which we live. Phenomenology organizes space in accordance with human intentions and experiences, because we are all immersed in space through action, experience and perception (Libura, 1990, p. 25). Referring to the relational understanding of space, the Polish philosopher Hanna Buczyńska-Garewicz (2006) draws attention to the constitutive way of human existence in space, which we define as habitation. A person establishes a relationship with their environment by becoming its inhabitant, and the place and surroundings become their home, entering the topography of human life. Therefore, the main feature of a place is that it is a human's environment, that is, it belongs to the world towards which the human has a relation of "being within" (Buczyńska-Garewicz, 2006, p. 26).

Therefore a person inhabits the place and fills it with the content of their presence. The geographical territory that is in the sphere of human influence takes a cultural form, expressed in the form of a cultural landscape. Landscape understood in this way consists of components of natural and cultural origin that interact to form a system of relations called cultural space, also referred to in the sphere of intangible assets (Myga-Piątek, 2012, p. 61). The components of the cultural landscape and cultural space can be described by what Stanisław Ossowski (1966) calls "cultural heritage". What we give value to is what is inherited. Cultural heritage includes certain "patterns of muscu-

lar, emotional and mental reactions” (Ossowski, 1966, p. 65) regarding material objects, situations, patterns of behavior, ethical norms, ways of thinking, concepts, judgments, imaginations. According to Jolanta Muszyńska (2014), living in a given place is not only physical but above all spiritual. Attachment to the place where a person spent a significant stage of their life, and attachment to its cultural symbolism and landscape elements both shape the person’s “little homeland” (Muszyńska, 2014, pp. 46–47).

Therefore, the question *Where are you from?*, which is the most often asked second only to getting to know someone’s name, is not only an address question, and in the face of current considerations it also becomes a question about a significant place, and indicates another aspect related to the attachment of a person to a place. It seems important here to distinguish the predictors of this attachment. From the point of view of humanist geographers, the relationship between a person and a place is an inseparable element of the natural human condition, and researchers in this field are interested in the “identification potential” of a place. Psychologists and sociologists, on the other hand, focus on this relation of a place and a person, making attachment to a place a variable that differentiates people and asking the question: what does it depend on? (Lewicka, 2012, p. 163).

Simone Weil (1961) indicates that “rooting is perhaps the most important and at the same time the most familiar need of the human soul, and at the same time the most difficult to define” (Weil, 1961, p. 194). Tadeusz Sławek (2011) points out that this “rooting does not cut people off from others, it does not exclude and distinguish them, but on the contrary – it introduces them to the entire network of connections and relationships”, it is “a form of understanding a human being as a deeply relational being, although we are aware only of some of these relations (...)” (Sławek, 2011, pp. 1–22). Human identity, as Jerzy Nikitorowicz (2009) points out, is always “shaped in a specific group, under the influence of a specific culture. It is not possible to create a self-image, self-concept or identification (belonging), if there is no reference group, significant people, or cultural heritage” (Nikitorowicz, 2009, pp. 344–345).

The birth certificate, whether formal or orally determined, has always assigned the subject a specific place, as Marc Augé (2010) says, “To be born means to be born in a certain place, to be assigned to a certain place of residence” (Augé, 2010, p. 34). Building a relationship with a place is therefore also building one’s own rooted identity. Living in the “space of flows”, “global village”, “progressive virtualization of space”, contemporary man is

faced with the need to answer many questions regarding the complicated process of creating their own identity. In the multifaceted concept of creating intercultural identity, Nikitorowicz (2005) indicates the importance of the problem of identity integration in the area “between” the local-regional and global-universal dimensions, between the past and the future. An individual is obliged to take into account the values and traditions that have prevailed for generations in a given region or country, while also becoming a modern citizen of the world. According to the author of the concept, intercultural identity is “a continuous self-definition of oneself in development in connection with the determinants of cultural heritage, participation and conscious presence in culture, the ability to organize life in the face of the macro-world offers, the number and quality of interactions with others” (Nikitorowicz, 2009, p. 386). Intercultural identity is thus shaped in the course of the interaction between the individual and their culturally diverse environment, both through spontaneous influences and deliberate actions.

### **The category of place and space in the theatre**

Spatial orientation in theater research is part of the “spatial turn” in contemporary humanities, consisting of establishing spatial issues as a superior research category (Gieba, 2015, pp. 27–38). In the Encyclopedia of the Polish Theater, we can read that initially the notion of theatrical space was associated only with the performance itself and was divided into the space of the stage and the space of the audience. Gradually, however, it was realized that the studies on the architectural and set design of the theater equipment did not exhaust the problem. In the late 1920s, Max Herrmann described the “experience of space” as the central problem of theater studies. Not accepting only the visual aspects of space, he examined it from the point of view of: the author, actor, audience and director. He pointed out that the art of theater “is not about presenting space, but about presenting human movement and activity in the theater space. This space is never or almost never identical with the real space existing on the stage [...]. The theater space is the space of art that arises as a result of a more or less internal transformation of the real space, it is an experience in which the stage is transformed into another world” (Balme, 2002, p. 180). Thus, theater draws the area of the performance space, which is separate from the space of real life and makes it the object of the spectator’s view. In her work on the geography of theater, Una Chaudhuri (1997) points to the career of space in drama, which occurred at the turn of



the 19<sup>th</sup> and 20<sup>th</sup> centuries, making space the main category of analysis of theater and drama, giving this category priority over time, history. The approach to theatrical space presented by the teatrologist and director Kazimierz Braun (1982) is also part of the humanistic geography trend, according to which the theater space and architecture, as well as the scenography, the audience layout and the manner of arranging the area of performance form a coherent whole, which encodes the information on the subject of social and political structures, intellectual trends and spiritual life of given epochs or environments. In his elaborations, he emphasizes this relational nature of a person and space: a person shapes space, gives it meaning, and space influences human behavior (Braun, 1982, p. 181 ff.).

The theater researcher Anne Ubersfeld (2007), who distinguishes the category of space and place in theater, must also be mentioned. "Since theater represents people's actions, the theater space is the place of these activities" (Ubersfeld, 2007, p. 109). In her concept, Ubersfeld defines theater space as an abstract concept containing all the relations that make up theater understood as a kind of spatial organization. Within the theater space, this French researcher distinguishes between a stage space, a stage place, a theater place and a dramatic space. Ubersfeld (2007) distinguishes between a place and a space. A theater place is, according to her, a specific architectural space that includes the stage, auditorium and all other places included in it and creating a specific theater along with its location in the surroundings. The stage place is a fictional place where the action was set. In relation to theater, the most broadly understood term seems to be the theater space, which includes the acting area (the actors' field of action) and the observation area (the spectators' field of view), while the space available to the audience's eyesight is usually the space physically used by the performers (Sajkiewicz, 2010, p. 95).

In my research<sup>1</sup> on the transmission of cultural heritage in the activities of non-professional theaters operating in Podlasie and Suwałki region, I chose as the subject of my research interest the theaters that deal with the issues of history, culture, and tradition related to the place where the theater operates. The localization of those theatrical activities which draw the content of their performances from the multicultural tradition of the north-eastern

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<sup>1</sup> The considerations contained in the article are related to my ongoing research activities carried out within the framework of the forthcoming PhD dissertation entitled "The transmission of cultural heritage in the activities of non-professional theaters. Comparative study from the perspective of regional education", which is being prepared under the supervision of Jerzy Nikitorowicz.

borderland is particularly significant here. An individual's social identity is the result of their functioning in a specific group, and the group is always connected with a specific territorial space, place, and cultural landscape. Borderland is a place that for centuries has created a unique opportunity for people to conduct a dialogue, discover themselves and Others, and shape their own identity based on a multicultural tradition. This intercultural space (Nikitorowicz, Młynarczuk-Sokołowska and Namiotko, 2019, pp. 9–11) therefore appears as a potential and educational challenge. The directors of theatrical performances analyzed as part of this research, often adapt for their presentations the places that normally perform a function other than a theater does, but which are related to the multicultural heritage of a given town or region. This phenomenon can be described by the relatively recent English term *site-specific performance*, which the artist and theater practitioner Mike Pearson (2010) sees as performances in essential places, the meaning of which we can re-establish through theatrical action, as the performance may activate the in-born ambiguity and special nature of the place. Places such as railroad tracks, barns, churches, houses, when adapted to serve as a theater stage “are in a set of topographic, cultural and social conditions and [are] inextricably linked with them” (Pearson, 2010, p. 48). Ultimately, claims Pearson, these assets of the environment in which performances take place imply time, space, and the embodiment of actors and audiences in completely different ways. Not only as tangible additions to the stage – rocks or tracks – site-specific performances give meaning and enliven the relations between people, the land or the surroundings and the history embedded in them (Marino, 2014, pp. 177–178). The term “theater place” is also used by Magdalena Gołaczyńska (2013) in her studies of local theaters in Lower Silesia, in which she points out that the creators of local theaters in Lower Silesia usually use urban space in their performances, looking for “chosen places”, finding them outside theater buildings, in places related to the culture of the given area or issues important to local community. She quotes, after Juliusz Tyszka (2010), the understanding of site specific theater as “a theatrical performance shaped in a place chosen by the creators due to its (primarily cultural) specificity, through which it co-shapes the course, reception and message of the entire project” (Tyszka, 2010, p. 196). Thus, the theatrical place comes to life in the space of interaction of actors and viewers and the space of shared experience of the multi-cultural and intercultural borderland. This activity initiates the creative conscious effort of the actors, as a result of which the will to discover one's culture opens the perspective to discovering the achievements of other cultures.

## Place pedagogy in theater practice

The perception of the reality around us through the lens of space has also become the subject of interest of educational researchers. It seems a natural process to include pedagogical reflection in the reflection on the cultural meaning of the place, because, as Maria Mendel (2006), who has popularized this perspective in Polish pedagogy, writes, upbringing “always takes place ‘somewhere’ and has its’ place” (Mendel, 2006, p. 9). Introducing the perspective of a place into the educational process of an individual, Mendel points to the relational nature of both entities. On the one hand, a place educates by the very fact that it exists, it affects the individual by its very presence; on the other hand, when involved in the educational process, it prepares for reflective, critical and liberal participation in the world. Mendel indicates the educational and animation possibilities of a place, making it “a carrying category that can stimulate and support the processes of interpretation, creative reinterpretation and the creation of patterns of pedagogical thinking that focus on a place” (Mendel, 2006, p. 22). Following Mendel’s approach, this concept can be embedded in the broader trend of pedagogical constructivism, which sees a place as a socio-cultural construct, the form of which has both educational and socializing effects (Kubiszyn, 2007, p. 227). The intention of place pedagogy, as Ilona Copik (2013) points out, is to “locate” a person in an environment close to them and to include this locality in the process of identity formation (Copik, 2013, p. 184). This goal is consistent with the assumptions of regional education, the task of which is to equip with knowledge, familiarize, strengthen and protect the world of core values, shape a conscious attachment to the ‘little homeland’, to the world of primary rootedness (Nikitorowicz, 2009, p. 218). The theoretical basis of this education is the belief that the values adopted by individual communities along with the cultural heritage reflecting them should constitute the starting point for educational programs aimed not only at acquiring knowledge but also shaping the personality. All this supports the process of creating an open, multi-level and multi-aspect identity of an individual. There is no globalism, according to Nikitorowicz (2009), when regional, national cultures are closed. The global dimension of education has the more reach the more it is “saturated with the local” (Nikitorowicz, 2009, p. 216).

Increasing cultural diversity causes significant changes at the level of identity-forming processes, making the individual face the challenge of reconciling their own identity with the available repertoire of cultural choices that are

not confined to one culture, but include elements belonging to different cultural orders. This is the core of the formation of educational activities in the field of intercultural education. The shaping of intercultural identity therefore involves learning on many levels, starting from family, going to local and regional, through national, to continental and global perspectives. This process is “a set of characteristic properties of different quality that make up the layers, planes between which culture and education (literature, art, values, traditions, rules of conduct and behavior, customs, rituals, customs) sneaks in” (Nikitorowicz, 2009, p. 386). This enables self-development and the formation of intercultural competences in its course, including knowledge, skills and attitudes conditioning positive relations with Others.

A legitimate issue from the perspective of this article is the role of theater in educating “to” and “through” place in the practice of regional and intercultural education. The pedagogical dimension of non-professional theater, according to Żardecki (2012), consists of shifting the center of gravity from the final effect of the theatrical work, i.e. the premiere of the play, to the process of creative activity in the process of its implementation, based on personal involvement and initiative, which serves the self-education and enrichment of the participants.

The activity of the non-professional theaters analyzed in the research is not limited only to the sphere of aesthetics, but also presents the socio-cultural, educational and identity-creating dimensions of the implemented practices. The theater set in place, referring to the local cultural landscape, bringing together young inhabitants in action, becomes a special place, creating conditions for the individual to begin the process of self-exploration. This is facilitated by, among others: direct contacts between participants; solemn atmosphere of creating and implementing theatrical phenomena; intimate, personal contact with the borderland culture through learning about the fate of one’s own ancestors; the possibility of active participation in projects based on the tradition of a given region; multinational theater groups, direct contact with people of other nationalities and religions in the process of discovering the heritage of the place; emotional commitment related to strong group integration. All these aspects make it possible to treat theater as a space for educational work, shaping attitudes, creating identity, and building a community through active, present work.

On the basis of the analysis of the activities of non-professional theaters operating in Podlasie and Suwałki region, which in their projects undertake the issues of cultural heritages, I distinguished two types of theaters in my research: monocultural theaters (dealing with the issues and heritage of a specific

tradition) and multicultural theaters (referring to the community, multicultural heritage of the place). An example of non-professional theater, which illustrates the pedagogical dimension of theater practices in the context of forming the intercultural identity of young people, is the activity of the children's theater *Kroniki Sejneńskie*, whose creative work is carried out under the pedagogical and directing supervision of Bożena Szroeder at the center "Borderland of Arts, Cultures and Nations" in Sejny. Initiated in 1999, *Kroniki Sejneńskie* ("Chronicles of Sejny") is a project deeply rooted in the concepts of the Center for social, cultural and educational animation aimed at building a rooted, open identity, conscious of the multicultural heritage of the Polish-Lithuanian borderland. At the source of the performance lies the many years of workshop work of the Center's animators with children and youth from Sejny, which initially focused on archiving memory, and over time evolved into personal experiences of meetings, relationships, and joint work of the theater participants. Reading the interpenetrating layers of historical and cultural heritage took place through interviews with the oldest inhabitants of the town, learning about the multicultural history of Sejny, developing abandoned spaces for artistic activities (synagogue, old tenement house), workshops and training sessions, projects, seminars, games, etc. Transferring the experiences gained in this way to the plane of theatrical productions was an attempt to answer the question about the ways and possibilities of protecting the cultural heritage of a place through art. Sejny is a town located near the Polish-Lithuanian border. It is inhabited by Poles, Lithuanians and Russian Old Believers, and before the Second World War it was also inhabited by Jews, Gypsies, Germans, Belarusians and Tatars. An important element of this message is to nurture a multicultural voice that takes into account the memory of the inhabitants of Sejny, who are no longer present in the current demographic structure. The young actors, using a wooden table-model on which the old Sejny were recreated in clay forms, and by setting the stage of the performance in the Sejny synagogue, touch upon important problems of the place and the memory associated with it. It is a specific site-specific performance that introduces this young generation to the full complexity of cultural heritage, so that – as the show's creator and director points out – it becomes not only a collection of names and isolated concepts, but also a home to their hearts as broadly understood multiculturalism<sup>2</sup>. Katarzyna Niziołek points to the intercultural effect of art,

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<sup>2</sup> Pracownia Kronik Sejneńskich.brw. [http://pogranicze.sejny.pl/pracownia\\_kronik\\_sejnenskich,103.html](http://pogranicze.sejny.pl/pracownia_kronik_sejnenskich,103.html) (1.03.2021).

describing it using its five functions, “the ability to: (1) create a neutral ground for an intercultural encounter; (2) creating an auxiliary language to support intergroup communication; (3) developing creativity in thinking (leading participants beyond conventions, schemes, stereotypes); (4) stimulating collective activity (cooperation); and (5) expanding the boundaries of the perceived (making marginalized or excluded groups present and making their problems visible in the public sphere)” (Niziołek, 2011, pp. 156–179). Theatrical activity understood in this way opens a space for initiating numerous activities in the field of regional and intercultural education.

From the moment the project *Kroniki Sejneńskie* was initiated, the same play has been undertaken by subsequent generations of young Sejny inhabitants, bringing stories about their families and neighbors into the existing structure. This “heredity” of the project is the process of transmitting the memory of a place through a scenic message. This reference to memory and place is reflected in the category of social pedagogy proposed by Maria Mendel and Wiesław Theiss (2019), defined as a place where “memory is a place, in particular a place in the present reality, where the subject processes the past, making it something of today.” (Mendel, Theiss, 2019, p. 10). Through the theatrical performance of *Kroniki Sejneńskie*, the past has been “speaking” continuously for over a dozen years. As Bożena Szroeder points out in the theater program, this creates “a contemporary borderland myth in which everyone is at home – regardless of national or religious differences – and feels they are heirs of a multicultural heritage”<sup>3</sup>. This action initiates the creative conscious effort of the actors, as a result of which the will to discover one’s heritage is the basis for learning about the achievements of other cultures, as a continual becoming and opening to Others, while enriching oneself and one’s own inherited culture.

The category of place is presented in the article as a socio-cultural construct with both educational and socializing impact. In the adopted perspective, the text draws attention to the possibilities of research and analyses that would use the potential of theatrical space as a sphere of pedagogical influence in the field of regional and intercultural education. Activating the identity and symbolic potential of a place through theatrical activities is associated with the subjective process of discovering the immediate surroundings and at the same time shaping the message about it through the joint, active,

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<sup>3</sup> Szroeder, B. *Pracownia Kronik Sejneńskich*. brw. [http://pogranicze.sejny.pl/pracownia\\_kronik\\_sejnenskich,103.html](http://pogranicze.sejny.pl/pracownia_kronik_sejnenskich,103.html) (1.03.2021).

bodily and emotional involvement of young actors. This process of reading a place through experience and embodied movement becomes a form of social interaction and communication that provokes social reflection on issues important for building a community of dialogue and tolerance, in the case analyzed here, that of borderland areas. Participation in such a theater practice opens the possibility of shaping the identity of an individual in the intercultural space.

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## **The impact of social media on fulfilling identity needs of a person – the case of China**

**Abstract:** In order to live a normal life, a person must answer the question about themselves – about their image, worldview, capabilities. Typically, one’s identity is built on the basis of the opinions of the environment. A person either compares themselves with it or uses the opinions of people who are important to them. In this way, the person builds their own inner continuity, which provides them with a sense of stability. It is a dynamic process which very often determines the colour and complexity of human life. Today, the closest environment are more and more often the social media. Especially for young people, they are becoming an important source of information about themselves and the world. Yet to what extent do social media offer opportunities for authentic manifestation of one’s self, and to what extent do they become a space for creating parallel identities? Young users are eager to use social media, which influence their lives and identities. The problem is illustrated with the example of China, a large and original social media market.

**Keywords:** identity, social media, interpersonal communication, China

### **Introduction**

For a sense of self-confidence about life and a sense of existential security, a person needs to acquire “knowledge of oneself”. It is a process that lasts practically the entire lifetime, but gains a special dynamic in childhood and adolescence (although it can be discussed even already in the context of infancy). Immediately after birth, even if a child could speak, they would not be able to answer the question “Who am I?”, but still such a child contains the potential to shape their identity, which will be revealed throughout their life (Bornstein, 2014).

The child self-realizes in a special way through interpersonal communication. S.W. Smith and S.R. Wilson point out that one of the new and particularly important directions of research into interpersonal communication

is its technological entanglement. Technology has specific implications for meeting identity needs and changes the dynamics of this process (2010). It is therefore justified to undertake research into the impact of the media on building human identity. All the more so as media reality is changing rapidly and the pace of these changes often goes far beyond the forecasts made years ago. Technology often puts a person in situations for which they are not entirely prepared (Hansen, 2020). By facing them, they build their identity in a completely different way than even thirty years ago, at a time when the Internet was just beginning to gain global momentum.

A heuristic approach to an issue allows to learn new facts and, above all, discover the relationships between them. This is especially important in media research, where changes occur very quickly. In addition, the media force certain changes in social life, which also take place faster under their pressure. The heuristic method makes it possible to seek out logical connections between changes in the media market and the transformation within the social order (Kahneman, 2013).

### **Identity and identity needs**

A question “Who am I?” results from being human and having the ability to reflect. It is located in a series of philosophical questions such as “When did I start to exist?” or “What awaits me after death?” The Stanford Encyclopaedia of Philosophy emphasizes the existence of many different definitions of human identity. The broad discussion on this issue is positioned between the placement of the concept of identity on physical and psychological continuity (2020). In the study of the impact of communication on identity, definitions highlighting psychological continuity seem more useful. According to this approach, “identity can be regarded as a unique, individual-specific and relatively stable way of defining, understanding and experiencing oneself, which is an expression of the desire to achieve personal autonomy and internal integration. Identity as such constitutes the individuality and uniqueness of each person” (Kwapis and Brygoła, 2013) [own translation].

Therefore, identity, in psychological terms, is the subjective attitude of a person to themselves, their ability to define themselves, their own values and a sense of belonging to a group with similar beliefs, while at the same time being aware of their own distinctness. Searching for answers to the question “Who am I?” becomes more and more conscious to finally reach a critical moment during the period of adolescence (Sokal, 2000). Accord-

ing to Z. Bauman, identity should be created rather than discovered. This involves some work to be done. It does not end when you obtain a certain *status quo*. Identity is not so much fluid but rather dynamic, so it demands fight and protection (Bauman, 2007).

The sense of relative unchangeability (constancy, continuity) of oneself, despite the passage of time and changes in personality, is an important psychological indicator of one's own individual identity. Striving to build it is a truly human need that grants the basis for stable development and action. Identity needs cannot be changed, replaced, suppressed or negotiated (Carroll, 1988).

Identity is important to a person for many reasons. We can talk about ensuring our inner sense of cohesion, the need to define our relationship with the world, but one of the most important reasons is the pursuit of autonomy. The fundament of this process is seeing oneself as someone separate, valuable. When confronted with new challenges, a person "is tested" and acquires knowledge about themselves, becoming not only an autonomous, but also an individual, a unit. The cases of the so-called wild children (e.g. a boy from Aveyron) show that people who had no chance to shape their identity have no idea about themselves, they cannot say anything about themselves. Identity is essential to building not only the image of oneself, but also the social relationships. T. Paleczny emphasizes the special role of cultural identity as a kind of social binder of individuals. It gives the components of identity "the order and meaning" (Paleczny, 2008, p. 22).

Interpersonal communication (Fogel, 2002) is the most common source of knowledge about ourselves and means to fulfil identity needs.

Some of the elements of the built identity are self-image and self-esteem. Self-image is a relatively constant set of self-imaginings. Self-esteem is a part of the self-image. Whether it is high or low has a huge impact on communication processes. People who feel good are positive about their own communication skills (Adler, 2006).

The self-image is shaped throughout the course of personal development. At the time of the birth the child has no such image yet. Even if the child could speak, they would not be able to answer the question "Who am I?" Around the sixth or seventh month, the child begins to perceive themselves as a separate being. At this time, children begin to get fascinated with parts of their body, e.g. a hand or a foot. They start to be convinced that: "this foot is me, this hand is me." As the child develops, this sense of identity and self-autonomy becomes more and more pronounced (Wachs, 1992).

Self-image formation has its own social context. Sociological research focuses on different mechanisms of building self-image than psychological research, which focuses on the individual's experience of oneself. Nevertheless, both of these research trends complement each other perfectly (Ackerman, 2020). For sociological experience, particularly important are the interactions between the individual and the social environment. R.B. Felson pointed out that some people have a positive effect on our self-esteem and others – a negative one. The self-image is shaped under the influence of the assessments of our environment (1985). Of particular importance here are the so-called significant persons, such as parents, husband, wife, friend, colleagues. Parents influence the self-image of their children from an early age. Children will try to imitate a parent that has a positive image, and in the situation of lack of one, they will look for a pattern outside the family. How important we consider various characteristics depends to a large extent on the opinions of others (Felson, 1989).

Another way to explain the construction of a self-image is comparing oneself to others. We build our self-image by comparing ourselves to others. That is why the type of reference group we find is so important. People often apply unreasonable standards to that. Some comparisons can be painful and destroy healthy competition. The greater the importance of certain values for self-image, the higher the level of competitiveness. However, we usually select people who are close to our ways of acting and values for comparisons (Suls and Wheeler, 2000).

Self-image is a subjective matter. This is why the lack of realism is likely to occur. Sometimes it can be over-idealized, other times people exaggerate with severity. Maintaining the myth of perfection in children and denying them the right to commit mistakes may have a negative influence on their development (Adler, 2006).

The self-image is shaped throughout the course of life. By the age of 24, the self-image is dynamic and developing. After 30, this image stabilizes. Of course, it does not mean that it will not change at all anymore. A person changes and so changes their self-image. Hence, it has a kind of flexibility, but on the other hand, it is stable enough to resist change. A certain image of ourselves that we acquire is difficult to change, so we are more likely to look for people who will confirm it. This tendency to seek affirmative information is called cognitive conservatism. It is possible to overcome such an attitude, but only if the information is perceived as competent, personal, justified in the sense of what we think of ourselves, coherent and abundant (Greenwald, 1995).

Another communication problem that concerns building other people's image is a *self-fulfilling prophecy*. It is a situation where the original subjective belief about other people leads to actions that objectively confirm these beliefs. They are often false in nature and may have been suggested by third parties. Particularly many studies have focused on the occurrence of *self-fulfilling prophecies* in close relationships, such as ones between parents and children or teachers and students. They become important for understanding the relationship between social beliefs and social reality. A self-fulfilling prophecy can also apply to oneself (Buller, 2001). In many cases, it can become a mechanism for disseminating social stereotypes. It can play the role of a sort of *placebo* in building identity needs (Rosenthal and Jacobson, 1968).

People use certain mechanisms to verify or confirm their identity. Their choice depends on whether it is built on a social role, a group or certain selected categories. By acting this way, people build and maintain a social structure in which identities are embedded. People can modify their identities to achieve specific communication goals. Some are more flexible and the others – less. A higher level of such skills may result from certain innate characteristics or be an outcome of appropriate preparation (Stewart and Logan, 1998).

A variety of tools can be used to modify one's identity. How the identity is controlled largely depends on which channel is chosen. Yet there are a few things we should pay attention to. They include a behaviour that consists of words and nonverbal actions. Another element is the appearance. Sometimes it builds a certain professional image. With the outfit we pass information about ourselves. Another element is the place and the surroundings. One such very telling element of the environment is a car (Adler, 2007).

To understand identity, it is important to capture its dynamics, which makes identity require a kind of monitoring, following current life and developmental situation of an individual (Kwapis and Brygoła, 2013). Education is an important tool in shaping it. School is a natural environment in which identity is shaped. Factors such as where we come from, according to what principles we were raised by parents and family, affect the initial shape of our identity. Our self-image evolves throughout the course of education, in contact with the school community, and through the influence of others, both peers and teachers. Educators must skilfully influence students in such a way that they do not lose their distinctive identity traits. Students must be convinced of their own individuality, but have respect for others (Babiarz and Garbuzik, 2017).

## Media as an identity building tool

Young people live in a world dominated by mass media which become an integral part of their lives and create their own self-image. Thus, it is the task of teachers to properly prepare their students for the rational and ethical use of pop culture so that they can draw positive patterns from it, while at the same time protect them from all the dangers that can go with it (Babiarz and Garbuzik, 2017).

Communication is now under intense pressure of technology. Technology-mediated communication plays an increasingly important role in mutual relations. Somehow, this situation was predicted already decades ago, by one of Apple's founders, Steve Jobs. After his departure from Apple to the NeXT company, he announced a new vision for creating what he called "interpersonal" computers. While Apple was creating "personal" computers that were focused on human-machine interaction, NeXT was supposed to create "interpersonal" computers the essence of which would be people interacting with other people through the machine. Jobs decided that such changes would take place the fastest in academia and then in business. He considered that "interpersonal" computers would revolutionize communication between people as well as their work (Siegler, 2020).

Interpersonal relationships become crucial for building a human identity. The increase in technology-mediated interaction results in a reduction in the number of direct interpersonal relationships. This way, social media gain increasing influence on identity formation and self-understanding (Ganda, 2014). Popular culture also perpetuates the belief that identity can be shaped through new technologies. In the well-known film "You've Got Mail" with T. Hanks and M. Ryan, email plays a major role in shaping the main character's alternate identity ("You've Got Mail" directed by N. Ephron, USA 1998).

However, the development of social media has caused some difficulties when it comes to interactions. There is often an unspecified number of communication partners. For example, if you communicate through Facebook, you often deal not only with the profile owner, but also with others who were invited to join it. Who is the author of the retweeted message? Who owns the digital footprints on social media accounts? When we enter relationships by means of social media, we are dealing with numerous speakers who send us their messages. Communication via social media is a testament to the intensive development of one of the most important features of digital media – hy-

pertextuality. Some media functions become an extension of a person. Is the memory of contacts in your smartphone not a prosthesis of human memory? Is this conducive to building a human identity and a coherent self-image, or rather does it build a universal identity based on completely new criteria, bypassing factors such as language or country of origin? (Baldauf, 2017)

The importance of social media increases at certain critical moments of human life. For example, in the case of students who leave their home areas to live in an environment that is completely new to them. This creates a certain tension between identification with the old and the new environment in building one's identity based on the media. On the other hand, social media give the opportunity to explore a new environment and present oneself even before we physically find ourselves in a new space. This can have a positive effect on reducing uncertainty, but can also speed up processes of social comparisons. Hence the desire to "improve" one's image on social profiles both in terms of external appearance and presented lifestyle. Participating in social media can therefore result in self-presentation fears (Thomas, 2017).

Social media are a very dynamic part of the media market. There are not only new features, but also new platforms. Users do not typically wonder how setting up a profile on a new platform can affect their lives. Issues related to privacy, disclosure of personal information, or security usually arise only later. Online communication is often approached without any reflection, as a kind of "technological enthusiasm" raises above it. Usually, the damage suffered forces reflection and brings concrete action. What is obvious in offline life is often far from online reality (Terras, 2015).

Social media are changing the approach to meeting people's identity needs as they create new needs and show the way to fulfil them. This is primarily the ability to create multiple parallel identities. Even trying to transfer real life to a social account is often inauthentic. It is more an attempt to create images than a reflection of real reality (Akbari, 2018).

It seems that social media have a big problem with authenticity. It is enough to analyse profile pictures. Authenticity on social media is under pressure. Therefore, the identity being shaped through them is also under pressure. It is more a project in the realization than a state, an identity of "imagination" than "reality", more how we want to see ourselves than how we do see ourselves. So will the pressure of social media not make it difficult for us to define our own identity in the real world? The ubiquity of technology can cause difficulties with building their identity for millions of people. This can be well observed in the Chinese market, which is not only one of the



largest in the world but has also built a segment of social media alternative to the rest of the world.

### **Human identity and media in China**

The Internet is an inseparable part of everyday life for younger generations (people who were born approximately after 1990). The widespread usage of social media makes the youth develop a kind of Internet Addiction Disorder which affects the shaping process of their personal identity. Identity consists of certain unique character qualities of an individual or a group, it also includes the awareness of the social position that people belong to and role they play as members of the society. Many modern media users depend on the media emotionally, to the extent that it generates a sense of loneliness in the real life and creates confusion between virtual and real roles that they play. The following examples will be focused on showing how the youth construct their self-image in the modern media era and what kind of dilemma the youth face in the process of identity construction.

80% of the active users Sina Weibo, Redbook and Tiktok (social media websites similar to Facebook and YouTube) are teenagers and young adults. When interacting with others online, one can judge whether the person meets one's requirements for being friends by browsing through their posts on the Internet and viewing the comments they made. Users can fill their profile on Weibo with information to introduce themselves. For example, to show off their job, hobbies and so on, which provides others with easily accessible information about them. This, however, creates two particular problems.

The first problem is that interpersonal communication skills of young people are worsening. Everything is available online so asking questions and making friends in real life becomes more difficult. Cyberspace provides users with means to construct their image through online presentation. Individuals can project their self-image through the content they share and make on the Internet. Thanks to that, individuals can be found by strangers with the same interests or hobbies. It is extremely easy to make friends online and on one hand that is a good thing. However, on the other hand it cripples the real-life communication skills and creates issues with self-image. It is possible that an outgoing and talkative person online would be very shy and quiet in the offline situations. People who were born between 1990 and 2003 stated that they can find people with similar or even the same interests through the production and dissemination of pictures and short videos. When asked about

the reasons for this, they said that people with similar interests will find and watch their videos of their own accord (Jinfeng and Shuhui, 2020). In this way they can build a community of like-minded people really quickly.

The second problem is that with the help of the Internet, the youth can play the role they had always wanted but could not play in real life. Individuals perform selective identity on the social media for two intentions, to depict themselves in a way that is congruent with their ideal-self and to cater the online audience. Some critical remarks and articles are showing that the virtual self of college students is one they do not dare to express offline. To a certain extent, the process of virtual image construction affects the creation of the self-image. It is easy to see how one is perceived online or even assume a completely different personality. From the psychological perspective, the feeling of inadequacy and dissatisfaction lead to a reverse image (Stanton, 2016). In extreme cases, people who are kind and cultured in real life can act like barbarians using vulgar language in the cyberspace. It is the freedom of new media that gives users a possibility to perform and express themselves with a simple account login. It removes the limitations that are present in real life such as age, gender and education.

Most of Weibo users hide their real data. Wang (2006) once concluded this phenomenon as identity deception. Users are known to be deceptive, for instance about their name, gender or age. Online anonymity provides users with a comfortable atmosphere of expression. Users do not have to worry about making a bad impression on others due to improper words and phrasing. There are two trends about the identity construction in the media era. The first one is to extend the lives on the Internet so that other users can understand them better by, for example, sharing some important moments. This is almost the same as in real life. The second and common one is to reconstruct the identity by taking advantage the anonymity feature of social media that allows users to reshape themselves without any concern. For example, an introvert people can be talkative on the internet. Users reconstruct their own identity and want to get the acceptance and confirmation from others.

Social media is an indispensable part in the youth's social lives. The youth use the social media to build new peer affiliations, manage existing relationships and inform about social activities (Boyd, 2014). Users are often divided into different groups according to their attitudes towards something that happened recently, peers synchronize the perception of shared context in the social media group. In the process of discussion, they can change their stances at any time, thus changing the group they belong to. The users' at-

titudes towards a certain event always change along with opinions of other members, which is called conformity. This is especially visible in China because people here generally do not like conflict and do not want to stand out. When members of the group share content, the other peers of that group will develop synchronized affinity towards the content (French, 2017). Group identity is a part of individual self-identity.

National identification is a positive feeling or the recognition of social interaction which involves the feeling of belonging to a national community and understanding the rights and duties of being a nation's citizen. National identity can create a sense of belonging among the community members in the society. In China, one can find many posters and short slogans that affect the group identity construction. Short TV programmes in the metro or in the bus provide a concise message about social values. This is to inform people or awaken their awareness to be more civilized and make efforts for a better city.

Chinese studies show that social media satisfy vital identity needs of the Chinese youth. They give young people a sense of belonging. They allow people to identify themselves with specific worldviews and beliefs. They also make it possible to quickly change views along with the changes in the group one identifies with. Social media become a place of creating one's own image. Sometimes this involves creating an alternative to who someone is in everyday life. But even more often, it involves extending one's life to happen in the virtual reality, which is becoming increasingly more attractive and seems to offer more possibilities.

## **Conclusions**

The Chinese social media market is huge and has certain distinct characteristics. Over the years it has been built as an alternative to the global system. Despite the pressure of global media corporations, Chinese services, e.g. Weibo or Redbook, are as popular as Facebook and YouTube. Moreover, the direction of expansion in recent years has been reversed. The Chinese TikTok application has grown to become a global tycoon within four years, and almost half of its two billion users are younger than 24 (Paul, 2020).

Social media have changed the way individuals fulfil their identity needs. In many cases, they further removed the natural sources of identity building, which were primarily related to the family environment. The social media environment is dynamic, changing rapidly, and carrying various trends. This

can trigger some discontinuities and changes in the way identity needs are met, especially among young people. Undoubtedly there is a need for further research, especially on the impact of social media platforms on identity building understood as psychological continuity. While social media contribute to building certain social relationships, where we can even talk about overabundance, the issue of internal cohesion can lead to a kind of “digital schizophrenia”. The temptation to build parallel identities seems to be strong when the tools are at our fingertips. This can lead to a situation where this identity prevails over the real life.

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# **R**EVIEWING ARTICLES





***Maura Sellars: Educating students with refugee and asylum seekers experiences. A commitment to humanity, Opladen – Berlin – Toronto 2020, Verlag Barbara Budrich, pp. 170***  
**ISBN: 9783847422891**

The 2019 edition of the joint OECD, ILO, IOM & UNHCR International Migration and Displacement Trends and Policies Report shows that by mid-2018, despite decreasing numbers of refugees entering the European Union and Turkey, the global refugee population had reached 25.7 million (EASO Annual Report..., 2019). We are not able to hold people back from escaping a bombed country with a totalitarian regime where their health and/or life is in danger.

The process of becoming/being a refugee is complicated and multi-staged in its nature (pre-emigration phase; escape; reaching the country of first asylum; settling in a new country; post-migration/repatriation phase (return to the home country) (Grzymała-Moszczyńska 2000). A change of place of residence is connected with the constant accumulation of new, sometimes very difficult, experiences at various levels of human functioning. John Berry's theory of acculturation shows that the process of entering the circle of a different socio-cultural reality is long and multi-faceted (Barry 2003). Every change of residence place, in a more or less violent way 'forces' the need to 'move' within a different culture and social reality and to interact with people with various 'software in the minds' – using Geert Hofstede's language (Hofstede G., Hofstede G.J., Minkov M., 2010). Students with asylum seekers and refugee backgrounds often leave schools early, which is caused by many difficulties in their path (poor linguistic competences in the field of new language, cultural differences, including conflict of values, school backlogs, unstable life situation, insufficient support system at school, etc. Because of that, some of them become part of the so-called excluded generation (Telles, Ortiz 2008). Education is an important factor of the wellbeing and integration of students with refugee and asylum seeker experiences. Therefore, it is more and more important to conduct empirical research and theoretical analyses in this field.

The main goal of the reviewed monograph is to begin a dialogue to focus on everyone involved in education, to the stark realities that are so much part of everyday lives in westernized societies. They should not be accepted without critical reflection and without attention to what it is to be human and humane. The author of the book analyses the participation problem of refugees and asylum seekers in the education system, which, in her opinion, is an '(...) increasingly inappropriate learning environment for many children and youth from multiple backgrounds and life experience (Sellers 2020, p. ix)'. The monograph consists of nine complementary chapters which undertake current problems of political, social and cultural contexts of modern educational system and thus, students with refugee and asylum seeker experiences connected with taking part in education. The author analyses important and current categories related to the educating forces of migrant students, which are: school culture, belonging, empathy, resilience, empowerment.

First of them: *Power, Politics, People and Pedagogy*, begins with the threats of the idea and purpose of *mass education in the neoliberal paradigm*, as dominant in the contemporary education. The author notes that nowadays, educational policy in capitalist countries is heavily influenced by the ideologies of various neoliberal economic policies. Students are regarded as 'human capital' and are educated to have the skills and attitudes of a productive workforce. Next she focuses on the concepts of *love and care in education* which are based on being a human. The last part of the chapter (*Postformal Education*) is devoted to the strategy which assumes a dialogical process between the teacher and the students, in order to develop curriculum and evaluation procedures. In conclusion, the author shows the relationship between developing more equitable, more inclusive societies reconceptualising education (framework pedagogies of love and care) and resorting trust to those who have undergone the most extreme dehumanizing experience.

Chapter two *Power: Discourses of Power*, analyses the discourses of power, epistemologies, and social control as it is manifested in the educational institutions of the western societies in which students with refugee and asylum seekers backgrounds are placed. The space for analyses and comparisons in this chapter is based on Foucault's understanding of the following issues: *discourse and power, knowledge and education, racism and exclusion*. Formulating implications for students with refugee and asylum seekers backgrounds the author emphasizes that school resembles an institution with power structures. The totalitarian power of school provides potent imperative to meet the standards of the norm and engage in institutional surveillance, monitor-

ing and evaluative techniques overriding any self-originating ethnic intention. Therefore, the author of this work concludes that for societies which accept students of refugee and asylum seekers backgrounds and their communities, new 'norms' need to emerge, most especially those in relation to epistemologies and ontologies; 'norms' that challenge the core of neoliberal thought and practice.

The third chapter *Politics: Neoliberalism and Education*, explores the ways in which neoliberalism is presented in educational system and how implementation of this political and economic paradigm has changed the nature of teaching and learning interactions and what means to be a teacher and to be 'educated' in this political and economic paradigm. Afterwards, the author shows the connection between *Neoliberalism and education*. She starts with claims that schools are the main place of acculturation, then shows that they are generally part of a system, the policies which are implemented as mandatory curricula, processes and procedures. In the section presenting the implications for students with refugee and asylum seekers backgrounds, the author notes that students who were a part of completely different educational system and have experienced and survived unimaginable trauma and loss, are facing uncertain challenges and future in a new country. In the light of many theories of child development, authentic education and student emotional and social wellbeing, teaching and learning environments such as neoliberal education system, would be condemned as unsuitable ecosystems for children and young people. The author writes that schools are focused on performativity. Therefore, they are a totally inadequate setting to support students of refugee and asylum seeker experiences.

The fourth chapter: *People: Refugee status, Trauma and Loss* allows a closer look at refugee and asylum seekers status. It also takes up the discussion on the ways in which an understanding of the nature and extend of refugee trauma experience and loss can be established in the literature and research perspectives of the first world cultural contexts in which these students are settled. The presented issues are a factor of understanding that those who suffer the effects of trauma and loss still have agency and that the increase in the numbers entangled in the global diaspora results in the revision of policies and restrictions that affect those with refugee and asylum seekers status, decreasing their compensation compensate for agency. It examines into some extent the ways in which developmental trauma relating to interpersonal interactions has the capacity to impact the cognitive and emotional growth of children and young people and analyses the potential of educational institu-

tions to undertake their social role in mediating these influences and promoting the development of healthy psychological development and resilience.

In the fifth chapter *Refugee and Asylum Seeker Status* the author clarifies what it means to have a refugee and asylum seekers status and emphasizes that unlike migrants, who voluntary leave their country in search of a better life elsewhere, refugees are forced migrants and they are the most vulnerable group of the population. The first subtitle briefly explains the meaning of the *Compassion, Love and Care* in relation to neoliberal societies and their educational institutions, policies and the impact of the acceptance of individuals with refugee status into their societies. Another part of the chapter is devoted to *Trauma, Loss, and Grief*. The author pays attention to the fact that, displacement itself is a significantly traumatic experience, causing the loss of the sense of belonging. Referring to the previously analysed issues, the author focuses on the *resilience* of students with refugee and asylum seekers backgrounds which may be understood as individual's capacity for adapting successfully and functioning competently, despite expressing chronic stress or adversity following exposure to prolonged or severe trauma. Concluding, the author claims that developmental trauma relating to interpersonal interactions has a capacity to have impact on cognitive and emotional growth of children and young people and analyses the potential of educational institutions to undertake their societal role in mediating these influences and promoting the development of healthy psychological development and resilience.

The following chapter five: *People: Compassion and Belonging* introduces current perspectives of the neoliberal policymakers and populations regarding refugee and asylum seeker, including students. This part of the book discusses some of the most politically sensitive and divisive issues of contemporary societies and their regulations regarding stateless and statusless individuals. The author concentrates on the influence of policymakers' activities concerning the situation of refugees and asylum seekers schooling. In this chapter considerations are focused on the term of *policymakers*. The policies of belonging require from the nation state and neoliberal societies to define, through the immigration policies, the physical boundaries, their political identities and to demonstrate their commitment to social justice, compassion and tolerance. In reference to that, the author formulates implications for students with refugee and asylum seeker experiences. The author presents attitudes towards refugees and asylum seekers that have undergone transformations at the level of policy and the attendant procedures. To sum up, the author notes that, in the case of students with refugee and asylum

seekers experiences and their communities who are granted the settlement rights, despite the rigorous detention, dispersion or other exclusionary practices, are the characteristics of safe educational places for those children and young people – spaces where compassion and belonging are the cornerstones of students wellbeing.

Chapter six: *People: Schools as Safe Spaces*, discusses the notion of what school can do, and ethnically should be like, places of safety and support for all students, especially those with refugee and asylum seekers backgrounds. The school climate, the hidden curriculum, the compulsory content of curricula and the ways in which the socio-emotional lives of students are supported are critical to the perceptions which students develop about their schools. The author of the considerations focuses on the following factors which support the integration process in the school space: *school climate, belonging, empathy*. Moreover, she presents the possibilities of school regarded as safe spaces for students with refugee and asylum seekers experiences and emphasizes that this is crucial in order to achieve emotional and social wellbeing. In formulating implications for students from refugee and asylum seekers, the author emphasizes that students who are socially accepted and welcomed in the school community with healthy school climates integrate more quickly and adapt to their new homelands more easily than those who are not accepted, experience racism and other prejudices and are made to feel and remain different from their peers and the school community in general. In the conclusion section the author notes that role of school leadership has never before been so critical towards the wellbeing of students with refugee and asylum seeker experiences.

Chapter seven: *People: The School and Leadership*, explores how schools may develop as supportive communities for students with refugee and asylum seekers experiences while remaining within the compulsory, economic ideals of neoliberal educational paradigms. In this chapter, the author analyses issues of school culture and school principle. The author highlights that it is crucial to build a personally relevant model which includes ethics of justice, care and criticism, all of which will have important frameworks for solving complex problems and dilemmas. While elaborating implications for refugee and asylum seekers students, the author notes that the leaders who acknowledge and effectively design school organization, implement wide transnational and transformative pedagogical strategies and promote staff mindsets that appreciate the interconnectedness between emotion and cognition are most likely to provide safe spaces at school which students with

refugee and asylum seekers experiences desperately need and deserve. The chapter's conclusions are centered around the metaphor that 'schools are not an island of scholarship'. They reflect the culture, beliefs and values which comprise the school community.

Chapter eight: *Pedagogy: Ways of Knowing and Doing*, explores theories related to the children's development of interactions with their environments, understanding cultural differences and their importance in terms of emotional intensity and those which attempt to identify ways of making the meaning with geographical influences. In this context, the author analyses *Bioecological Theory* (Bronfenbrenner, 1979), *Cultural iceberg* (Hall, 1976), *Cultural Dimensions Theories* (Hofstede, 2001). The last part of the chapter is focused on the oracy issue. In the case of students of oracy that is not supported by any written language, all these cultural, personal values and beliefs systems respond to the social modeling of oral tradition. Formulating implications for refugee and asylum seeker students, the author notes that in the situation of a sudden change of place of residence, the process of adapting to a new cultural reality takes time. In the conclusion section, the author claims that the impacts of vastly diverse cultural perspectives can be totally hidden by the official term 'refugee and asylum seekers' irrespective of how transient these labels may prove to be.

The last chapter: *Pedagogy: Educating for Global Competence* concentrates on current education policies and practice in western countries with neoliberal economic agenda which do not have the capacity to authentically develop opportunities for students with refugee and asylum seeker experiences. The situation looks as if they disregard the global educational priority to 'lay foundations in childhood and adolescence so people have the 'ability to think complexly' and to hold a paradox in mind with resorting to abstract rational thinking that splits mind and body and which is the prevalent model of thinking in the western world. The author analyses education in the light of *postformal psychology* which not only focuses on the development of cognitive capabilities but contributes substantially to critical constructivism in educational contexts. After that, the author presents *Gidley's Model of Adults Postformal Reasoning*, which proposes supporting the development of the postformal reasoning skill for young people in the formal and informal curriculum. The last part of the chapter (*Transforming Education*) is devoted to the presentation of humane educational options proposed by Kincheole, Steinberg, Gidley and others, a glimmer which offers hope for rebalancing and restoring education and other dimensions of human life. In the conclu-

sion section the author emphasizes that the adaptation of school system to knowledge of the world of humanity and epistemologies and ontologies that are diverse and multi-perspectival is not only an opportunity for students with refugee and asylum seekers backgrounds to be reorganized as a valuable and valued population in school and society, it is also a reflection on the true meaning and importance of education.

The content of the monograph *Educating Students with Refugee and Asylum Seekers Experience. A Commitment to Humanity* shows that education systems in western countries despite many examples of good practice are not prepared to support education and integration processes. They function on the basis of the neoliberal paradigm, which locates the development of human capital at the center. Human being is treated as the capital to cope with the labor market/to be workforce. It is difficult not to agree with the author of the book, who notes that policymakers and people who manage these systems (on the national and local levels) overlook compassion, empathy, and intercultural sensitivity, which should be one of the central values that constitute the basis of education. It has a great influence on educational practice. This is one of the reasons why teachers, educationalists, directors, etc. are strongly focused on students' school achievements. Educational staff very often does not realize the character of students with refugee and asylum seeker backgrounds childhood, situation in their motherland, cultural belonging, resilience, etc. Many of them perceive this group of students throughout the period of education as Strangers – Different, misunderstood, provoking a whole range of hard and even negative emotions i.e. anxiety, fear or anger. Teachers establishing monocultural curriculums are unable to tackle the challenges of the contemporary world. Thus, both introducing changes in the educational policy and teacher education are becoming more and more significant.

The great advantage of the reviewed book is that most of the chapters have implications for students with refugee and asylum seeker experiences. Therefore, the monograph is an important contribution to the development of pedagogical theory as well as educational practice. It can be useful for both scientists and practitioners involved in working in a culturally diverse environment. I am convinced that the monograph would be beneficial in the context of pedagogy development and continuation of the discussion on educating students with refugee and asylum seekers experiences i.a. based on the empirical material analysis. At the level of international literature, there is still need for research and publications devoted to the socio-cultural (re) constructions of education in the situation of forced migration.

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WILLIAM S. NEW

**Ewa Ogrodzka-Mazur, Anna Szafrńska,  
Josef Malach and Milan Chmura: *The cultural  
identity and education of university students  
in selected East-Central countries. A Polish-Czech  
comparative study.* Göttingen 2021,  
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DOI: 10.14220/9783737012546**

### **Originality of research questions and hypotheses**

This monograph asks several comparative questions about important characteristics of Polish and Czech university students, using theoretical frameworks drawn from international literature on intercultural education. The authors' deep knowledge of the institutional and cultural contexts of this research situation is always front and center, and provides a window into a fascinating borderland region that most readers from outside the region would like to know little about. In this sense, the research is already highly original and interesting. The research questions, taken at a more general level, are also interesting and relevant. This is partly achieved through an impressive mastery of the literature pertaining to intercultural and multicultural education, at the university level, and specifically through their attention to the theories of borderland identity development. Their research hypotheses are appropriately modest – not promising to explain everything – but sufficiently broad to be of great interest, and all 'testable.'

The notion of the borderland for scholars from other places is likely to be highly influenced by historical and geographical particularities of, for example, the American border, or postcolonial formations in Western Europe. Because scholars from the U.S.A and Western Europe have established intellectual hegemony in this discourse, one might come to believe that *their* borderlands are the only important ones, and that theories that explain how

they work have universal application. As cultural insiders, from both sides of the national, linguistic, and cultural border in question, the authors here are able to dispel the illusion, drawing attention to other borderlands, from which we all can learn. They do this without ignoring the more general theories, thus providing an important addition to the theoretical and scientific literature about cultural border crossings, generally.

### **Quality of methodology**

The authors employ a wide variety of methodological approaches – from ethnographic observations and interviews, to questionnaire and self-report – to address their research questions. The research purpose of each methodology, and its theoretical justifications, are laid out clearly in the methodological section. Their analyses demonstrate complete mastery of both qualitative and quantitative methodologies.

### **Correctness of formulated conclusions**

The authors offer well-reasoned, evidence-based conclusions at the end of each chapter of the monograph. I admire the clarity of the presentation of the hypotheses, and the justifications for believing that a result is meaningful or not. There is sensitivity to the gray area between statistical significance and relevant tendencies evinced by the data, especially in the kind of muddy area of student evaluations of the institutions they attend, which are also in effect self-evaluations of the students' themselves. The chapters are mostly structured in such a way as to emphasize the results, with less space given to a discussion of the results. As a reader more inclined toward theory than data, I would have enjoyed somewhat more discussion and explanation of the statistical results, but that is probably a matter of personal preference. Though I think that the probable audience of this monograph – scholars and practitioners in higher education – would, like me, want to know a little more about what the authors believe the results mean, in light of the overall theoretical framework. For instance, in many cases, Czech students seemed to evaluate their educational experiences more highly than Polish students. I know that the data per se might not answer the question of why, but I wondered what the authors thought might be the answer.

### **Presentation and style (English language)**

The presentation is clear and comprehensible, offered in correct English. The prose is appropriately formal, in an academic sense, but always accessible to a general readership, neither overly technical or obscure. There are sentences that I, as a native English speaker/writer, would have written differently (and perhaps better!) but the quality of the translation is more than adequate.

### **Recommendation**

I would strongly recommend the publication of this monograph. There is intense interest in the field of higher education in the kinds of questions raised here, related to intercultural processes at all levels, the value of studying abroad, and student perceptions of the value of a university education. Many of these publications are very general, and do not offer the level of specificity with respect to some of the key questions, such as are offered here. I expect that this volume would be a valuable addition to university libraries and useful also for scholars and policy-makers. Parts of it would be useful also for teaching, and it is accessible to university students, even at an undergraduate level.



# **C**HRONICLE



ADAM BULANDRA

## **The local dimension of children's migrations and its impact on EU integration policy. Cracow, 4–5<sup>th</sup> December, 2020**

The conference on “Local dimension of children’s migrations and its impact on EU integration policy” had been planned to be held in Cracow, Poland as the second international conference organized within the MiCREATE project (Migrant Children and Communities in a Transforming Europe). The first was organized in Barcelona on 24<sup>th</sup> and 25<sup>th</sup> of October 2019 under the title “Migrant Children’s Integration and Education in Europe. Approaches, Methodologies and Policies”. It became an introduction to research in child-centered scientific projects focused on migration, integration, social cohesion and diversity across Europe. Fourteen months later it was time to share the first results and findings of the research and share it in the context of the European Union’s policy on the integration of migrants and migrant children.

Due to the Covid-19 pandemic and restrictions imposed by the Polish government that has prohibited live events, the international conference was an exclusively online event. It, however, provided opportunity to listen to speeches and discuss with over 35 academics from Poland, Spain, Slovenia, Austria, Denmark, Romania, the United Kingdom, Italy and Belgium but also from non-European countries such as Brazil and Zimbabwe. Participants were divided into seven thematic panels, including: integration problems and challenges from migrant children’s perspectives, best practices regarding the integration and education of migrant children, as well as an overview of the impact of Covid-19 national and supranational restrictions on the education of migrant children and the well-being and social situation of refugee children and children seeking asylum.

The research consortium within the MiCREATE project encouraged people to send papers which elaborated and explored both theoretical and practical problems of migrant children’s integration in local, European communities. The conference focused on child-centered approaches in recent migration studies, innovations in education which could stimulate the effective integration of migrant children or children in transition, including

distance learning in the context of pandemics or ways to anchor and adapt children in this new environment. Three ongoing Horizon 2020 projects on child migration have been represented in conference presentations.

The conference was organized by the Interkulturalni PL Association together with the project's partners and the City of Cracow (Commune of Cracow). It was opened by the deputy Mayor of Cracow Professor Janusz Kulig who made a short introduction reminding everyone that Cracow adopted a comprehensive integration strategy for foreigners living in the city in 2016. This led to the conclusion that such initiatives are very important for the local community to grow tolerance and strengthen intercultural bonds among people and as such are treated as the most valuable asset for the local government. It enables to grow city social capital and make it friendly for investors and a desirable place for settlement.

The keynote speech was presented by Dr Urszula Markowska-Manista entitled "Children and Migration – Contemporary Dilemmas, Crises and Challenges of Policies, Research and Praxis".

This lecture showed that apart from barrage of media information, NGO reports, and academic research, we are subjected to, there are no new topics in this area that do not repeat to us what has already been said, studied, and published. Yet there are still blank spots, crises and understatements. Child migration as a process that marks the lives of both adults and children demands constant reflection and a new, reliable interpretation of the reality in which children as migrants and societies call the hosts' function. Migration, and especially refugeeism, is usually triggered by situations that are more difficult to face than those encountered by adults and children at the next stage of their journey, in refugee camps, in the new country of residence. Migration usually stigmatises and forces one into submission. This important factor led our main lecturer that narration used in the research within the children studies shall be strip out of neo-colonialism and patriarchalism.

This approach was followed by the vow of establishing new paradigms in research represented among others by the lecture of Rachele Antonini from University of Bologna, who developed a practical dimension of the whole child approach combined with PAR research and bottom-up methodology. The presentation of outcomes of projects following such new patterns of research were also revealed in other presentations such as Shannon Damery's presentation of the Child Up Horizon 2020 project led by the University of Turin, Søren Sindberg Jensen's and Peter Hobel's case study on social anchoring reconsidered from a child-centered perspective, including also a best



practices presentation visible in Fernando Hernández's, Maria Domingo-Coscollola's and Juana M. Sancho-Gil's lecture on facilitated school culture transformation.

The discussion over the best practices in the formal and non-formal education was one of the main themes of the conference. Paula Lozano Mulet, Silvia de Riba, Paula Estalayo Bielsa and Marina Riera Retamero from the University of Barcelona were seeking integration boosts in the educational environment in cosmopolitan curriculum. As they had convinced, decolonial perspectives have remarked the need of reconfiguring euro-centric curriculums in order to embrace broader perspectives of the world. Others were seeking a key to better and more inclusive education in rising competences of teachers. This narration were present in the lectures of Monika Skura and Ewa Sowa-Behtane. The art-based methods seen as a turn to more universal language were discussed by Laura Malinverni, Paula Lozano-Mulet, Judit On-sès-Segarra and Miguel Stuardo-Concha from the University of Barcelona. Some particular presentations focused on non-obvious relations between certain stakeholders, such as Nettie Boivin's lecture on intergenerational multimodal story telling or Joanna Durlík's review of the teachers involvement in intercultural educational practices.

Some presentations were dedicated to the so call "dark sides" of the integration realm. Racism, ethnic exclusion, precariat, patriarchalism, peer violence and power inequalities were addressed in the speeches of Gro Helledatter Jacobsen from the University of Southern Denmark. Mira Liepold, Stella Wolter, Alev Cakir and Birgit Sauer provided an interesting analysis of refugees' treatment in Austria (University of Vienna), Anastasia Pylypenko presented an overview on Roma children treatment in Wrocław and the concept of the othering was conferred by Anke Piekut.

One of the conference panels was also dedicated to Covid-19 pandemic impact on integration of children with migration background. Very interesting speeches emphasized the vulnerabilities related to migrant children which may deteriorate their school performance during the epidemic. We were able to get familiar with the Brazilian perspective presented by Lucas Rech da Silva, Slovenian daily challenges presented by Lucija Dežan, Zorana Medarić, Barbara Gornik and Mateja Sedmak, the United Kingdom's perspective shown by Aleksandra Szymczyk and Shoba Arun from Manchester Metropolitan University and very interesting narratives about Roma children experiences presented by Damir Josipović and Cătălin Berescu.

A quite unique and challenging perspective was conferred by Shepherd

Mutsvara on inclusion and exclusion processes driven within the Zimbabwean diaspora, which prompted a vivid discussion among conference participants, and on abjection practices in Spanish schools reported by Fernando Hernández-Hernández and Juana M. Sancho-Gil.

The conference was well attended with approximately three hundred participants in total and at least fifty present at each panel. The conference language was English.

It was organized as part of the Horizon 2020 MiCREATE project which starts from the position that the existing social and political order does not offer enough autonomous space where children can independently speak for themselves. The aim of the project is to create 'a space' where migrant children of all ages are able to communicate and share their experiences after arriving or being brought up in the receiving societies. The proposed project embarks on a mission to gather their stories in order to support their needs and aspirations when it comes to their integration into the 'majority' societies, with the aim of making heard the voices of the least powerful members of our communities, as an argument and factor for change.

Stemming from the need to revisit existing integration policies, the research project aims at comprehensive examination of contemporary integration processes of migrant children in order to empower them. The project is problem-driven and exploratory at the same time. Its exploratory part mainly concerns the child-centred approach in order to understand integration challenges, migrant needs and their well-being. However, the findings of the open-ended exploratory research will be used in an explicitly problem driven way with an aim to stimulate migrant inclusion, to empower migrants and build their skills already within the (participatory) research.

The conference in Cracow proved to be one of the most important events dedicated to children studies opening a broad new agenda of possible fields and directions of scientific exploration. For the very first time it also brought the child-perspective agenda into the top discussion between researchers from the major academic institutions in Europe.

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Markowska-Manista and Dąbrowa (2016) distinguish in the Polish educational system the following groups of culturally diversified learners...

Nikitorowicz (2017) indicates that what can be observed currently is the creation and participation of humanity in three cultures...

Lewowicki (2015) and Sobecki (2016) specify the functions of contemporary education in the field of...

“Half of the examined teachers were not aware of the specificity of school in Latvia as the school of cultural borderland” (Urlińska and Jurzysta, 2016, p. 205).

**II.** For references (bibliography), the *Harvard Referencing System* should be used.

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#### **authored**

Sobecki, M. 2016. *Komunikacja międzykulturowa w perspektywie pedagogicznej. Studium z pogranicza polsko-litewsko-białorusko-ukraińskiego*. Warszawa: Wydawnictwo Akademickie „Żak”.

#### **co-authored**

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### **2. Articles in scientific journals:**

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### 3. Chapters in edited works:

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**III.** As regards web references, after providing the author’s name, the title of the article, and the URL address, the access date should be provided in brackets, e.g.:

Chrapkowska, L. 2009. Edukacja wielokulturowa i międzykulturowa – cele, założenia, przykłady działań. <http://www.45minut.pl/publikacje/19011/6.06.2017>).

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