



Georgios P. Piperopoulos
Anastasia-Natasha G. Piperopoulou

Managing Primary & Secondary Schools

A Primer

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GEORGIOS P. PIPEROPOULOS
ANASTASIA-NATASHA G. PIPEROPOULOU

MANAGING PRIMARY & SECONDARY SCHOOLS

A PRIMER

Managing Primary & Secondary Schools: A Primer

1st edition

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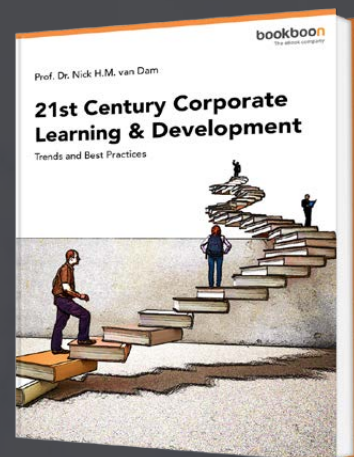
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To our students who give special meanings to our lives

ABOUT THE AUTHORS

Georgios P. Piperopoulos studied sociology and psychology at American, German and Austrian Universities receiving his Bachelor's, Master's and Ph.D. degrees; taught at several American, European and Greek Universities at both undergraduate and postgraduate levels before retiring from his professorial chair at the Department of Business Administration, The University of Macedonia, Thessaloniki, Greece.

[Dr Piperopoulos](#) is currently Visiting Professor at Newcastle Business School, Northumbria University, UK. He was Visiting Professor at Newcastle University Business School, U.K. from 8/2013 to 8/2016.

He has held a variety of managerial posts in private enterprises and public social services organizations in the USA and Europe.

He has developed and taught Leadership, Communication, Stress Management and Psychological Operations courses at the Supreme Joint War College of the Hellenic Armed Forces (Army, Navy, Air Force), the Army staff training school, the Hellenic Police Continuing Education Centre and at the Greek branch of the United Nations Peace Serving Operations Training Centre.

Professor Piperopoulos has published several textbooks and many popular books in Greek and English and authored hundreds of articles and editorials in leading Greek Newspapers and magazines. He has been a frequent guest on Greek TV and radio programs as a commentator and, for several years, presented his own show titled 'I Communicate Therefore I am' in Greek National and Regional TV channels and Radio stations. He has delivered hundreds of public lectures to groups in Greece, Europe and the USA.

Bookboon has published his books:

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His daughter Dr Anastasia-Natasha Piperopoulou (co-author of this book) works in Piraeus and lives with her son in Athens. His son Dr Panagiotis (Panos) Piperopoulos is Senior Lecturer at University of Liverpool Management School.

Anastasia-Natasha Piperopoulou received a B.Sc. (Honours) in Psychology and a M.Sc. in Health Psychology from the University of Surrey in the UK and a Ph.D. in Psychology from Panteion University in Athens, Greece where she achieved the highest distinction score and was valedictorian of the class of post graduate degree recipients.

She has been employed on a full time tenured basis for the last 3 years as psychologist in a public school for adolescents with special needs and disabilities in the city of Piraeus, after serving for 4 years at a similar school in the city of Chalkida, Evia.

She served for 7 years as a member of the original team providing psychological support to Hellenic Army and Air Force personnel under the auspices of the Hellenic Ministry of National Defence, and was as a member of the 'crisis intervention team' providing support, as needed, to families of victims.

Dr Piperopoulou has taught courses in psychology as an adjunct lecturer at the School of Pedagogical and Technological Education, a Greek University specializing in training teachers and at the Firemen Officers Academy of the Hellenic National Fire Department both located in Athens, Greece.

Prior to her full time employment in special education schools of the Hellenic Ministry of Education she had a private practice as a psychologist-psychotherapist in the city of Piraeus.

She has volunteered her services at the drug addict rehabilitation program '18+' of the Athens Psychiatric Hospital, at the psychiatric wards of the Athens National University Psychiatric Hospital 'Eghinitio' and the Nikaia Regional General Hospital 'Agios Panteleimon' of Piraeus.

She has contributed chapters in 2 books published in Greek under the titles '*Crisis intervention. Acute Psychological problems*' and '*Psychological Support by Telephone*'. She has published in the Journal of Psychiatry and the Journal of the Hellenic Armed Forces, has presented papers in National and International Congresses, and has contributed short articles to Greek Newspapers, Magazines and Greek electronic sites and blogs.

She is a member of the British Psychological Society (graduate member – chartered psychologist MBPsS), of the Association of Special Education Personnel in Special Education of Attica, Greece (seepeaa.gr) and of the Panhellenic Psychological Association.

PROLEGOMENA

The Education System was, is and certainly will continue to be one of the fundamental institutions in every human society.

From antiquity to current times it is through education that one generation passes on to its children and grandchildren existing knowledge in all fields of sciences, the arts, culture and civilization and simultaneously the tools and dexterities necessary for using such knowledge and also for furthering it.

Going through the educational system from kindergarten to high school and, later on, to college and university the young generations are enabled to face current challenges within their societies and Nations and be equipped to compete successfully on an international level within the reality of the modern multinational, globalized world.

Teachers have had in the past and still continue, nowadays, to dramatize the most pivotal role in every educational system worldwide. It would not be an exaggeration to characterize the teachers as the pillars for the educational system of every country on a worldwide basis.

Throughout human educational history it has been noted that some teachers are naturally endowed and charismatic (from the Greek word ‘charisma’ – ‘χάρισμα’, meaning gifted). Charismatic teachers become successful role models for their pupils and students inspiring and motivating them to improve their efforts in acquiring knowledge and striving to excel within and outside the classic classrooms.

Leaving the charismatic teachers aside, as they are exceptions to the rule, modern educational systems must ensure that the vast majority of teachers are exposed to top quality university level training, exhibit dedication to their role, and receive proper remuneration. These prerequisites should enable the vast majority of teachers to be adequately motivated to pass on successfully to their pupils and students, children and adolescents, existing knowledge, skills and dexterities.

One of the most notable quotes of describing the significant role teachers dramatize for their pupils and students has been attributed to Alexander the Great who, referring to his teacher the philosopher Aristotle, had remarked:

‘I owe living to my parents, and living well to my teacher.’

This comes as a corollary to the Aristotelian (the teacher's) dictum:

'Those who educate children well are more to be honoured than they who produce them; for these only gave them life, those the art of living well.'

In antiquity and until a couple of eons ago, the teachers were performing their roles alone, having been granted the authority to do so by the community's elders, by the religious order in which they belonged or simply acting as 'tutors' and 'craftsmen', i.e. as independent agents on their own volition.

Philosophers and artisans acted as teachers in the ancient civilizations of the city-states in the Mediterranean basin, in Mesopotamia & Persia, and The Far East, namely China and the Indian subcontinent.

Teachers, as a rule, enjoyed the respect of their communities who entrusted their children to their spiritual, emotional and intellectual guidance and, when needed, they were also chastised if the community or religious order elders felt that they were not performing their role properly.

The outstanding, dramatic, example of a bitter legacy in teacher disapproval by a society's elders has been the historic (and 'unjust') prosecution to death by drinking hemlock of the great Athenian philosopher and 'teacher' Socrates.

The accusation raised against Socrates was that he refused and failed to recognize the Gods worshipped by the Athenians and was corrupting the Athenian youth by teaching them '*unapproved new knowledge*'.

It behoves us to emphasize the historic realities that Socrates, the legendary philosopher, his student Plato with his Academy and Plato's student Aristotle with his Peripatetic school, were pioneers in 'teaching' and have left a legacy as did Confucius and 'Buddha' in Far East Asia.

A 20th century case of a community vs a teacher (the only resemblance to Athens vs Socrates was the accusation as it related to teaching scientific theory contradicting religious beliefs) was the '*Scopes trial*' also known as '*the Scopes monkey trial*' which took place in July, 1925 in the town of Dayton, Tennessee.

John Scopes, a young high school teacher, was accused of ‘introducing his students to Darwin’s evolution theory’ violating the State of Tennessee Butler Act forbidding the teaching of ‘evolution theory’ to any publicly funded school as it was contrary to Biblical teachings.

The ‘Scopes trial’, according to some objective observers, was a fabricated ‘show’ aimed to challenge the relevant State law and brought the town of Dayton to national attention through the influx of large numbers of reporters and journalists eager to listen and report on the rhetoric of two famed lawyers, namely, for the prosecution William Jennings Bryant, a 3-time Democratic Presidential candidate, and for the defence Clarence Darrow of the ‘American Civil Liberties Union’.


Shifting our focus from the teachers as persons to the organization in which they function, namely the school, we can easily discern that the contemporary school, at the nursery and kindergarten, primary and secondary levels, comprises a dynamic entity which requires proper management in order to successfully fulfil its defined and set role and stated objectives.

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These objectives, outlined as educational curricula and programs, are formulated and supervised by municipalities, prefectures, regional directorates or the State when schools are public and by their Board of Directors (as approved by the relevant State education authorities) when they are private.

Today's schools in the primary and secondary levels (in this book we will not deal with nurseries and kindergartens) comprise complex organizations where the role of the teachers as the protagonists in primary-elementary schools and as professors in various disciplines continues to be significant. In addition to primary school teachers and secondary school professors of various disciplines in modern schools there are many other persons enacting a variety of other roles as part-and-parcel of the schooling process, in the day-to-day affairs of modern education, globally.

Teachers, assistant teachers and teaching aids, non-teaching and auxiliary staff, professors of science and liberal arts subjects as well as parents associations, Boards of Directors and State Authorities comprise complex and dynamic entities. In this realm capable and creative school administrators must act as managers able to interface with all of the above productively.

The main managerial roles in nurseries and kindergartens, primary and secondary schools are, usually, personified by the School Head Teacher and Deputy or Assistant Head teachers, Principal or Director and Deputy or Assistant Principals and Assistant Directors in addition to department heads in all three types of schools as needed.

The idea of writing this book belongs to my daughter, the co-author, who has been working in a secondary special school for adolescents with Special Education Needs and Disabilities in Greece.

A note of gratitude goes from both authors to Mrs Karin Jacobsen of **Bookboon.com Ltd** for accepting our proposal and encouraging us to compose this '*primer*' which we hope will be a welcome and useful addition to existing relevant bibliography.

We will conclude this brief introduction by providing below a description of the book's contents:

The prolegomena serves as an introduction raising the stage curtain for the six parts that follow:

The first part is devoted to introducing and familiarizing the reader with the fundamental process of the historic evolution of the science (and for some the Art) of management and includes brief, but necessary, glimpses at currently prevalent theories of management.

The second part reviews the education (and schooling) process from antiquity, covering both the Western and Far Eastern civilizations, to present time realities of education and schooling.

The third part aims to provide the readers with a worldwide view and a brief but useful glimpse at the educational systems as they exist today.

The fourth part constitutes a rather rudimentary but useful glimpse at the status quo of special education provided to children and adolescents with Special Education Needs and Disabilities (SEND) in all countries dealt with in part three.

The fifth part makes a succinct presentation of the major research efforts and ensuing research theories on the concepts of leaders and leadership.

The sixth part is devoted to modern school administrators as managers and leaders.

The 'epilegomena' lowers the stage curtain as an epilogue to this book.

PART ONE – A BRIEF INTRODUCTION TO MANAGEMENT

1 WHAT IS MANAGEMENT?

We would like to start this section by kindly asking you, the readers of this book to accept, as we do, this down to earth, easy to grasp and widely used ‘rule of thumb’ type of definition which describes management as *“the process of setting goals, outlining strategies and techniques and using all available resources (human, material, financial, environmental) to realizing the set goals.”*

Introductory management and business administration courses taught as part of the subject curricula at high schools, colleges and universities usually present management as a subject, a science and in some aspects an art, which has a history of only a few centuries, coinciding with the first and second Industrial Revolutions of the 18th and 19th centuries when large-scale production utilizing machines emerged. The subject of management was more formally developed with the introduction of theoretical schemes at the end of the 19th and in early 20th century.



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The authors, at the outset, would like to join a large number of others who challenge the notion held by some that management is a very modern academic discipline and, in the world outside academic circles, a modern profession and practice. Should this be the case then anyone, and among them we and perhaps you, can legitimately and rightfully pose the following question:

‘Was management practiced in building the pyramids in Egypt some 45 centuries ago, the Parthenon and other edifices on the Athenian Acropolis 26 centuries ago and the Colosseum in Rome 20 centuries ago?’ to list but a handful among other large scale human endeavours.

The proper answer, most certainly, will be an unequivocal yes.

We should add to the above ‘yes’ the annotation that obviously the persons in charge of what nowadays we would characterize as ‘large scale project management’ coordinating human and material resources for building a pyramid, a Parthenon and a Colosseum were naturally gifted top level managers as well as brilliantly creative engineers and architects.

Surely they were not graduates of the Universities of Alexandria, Athens or Rome as such institutions did not exist at their time.

Certainly they were not Graduates of the ESCP Europe, Hungary’s Budapest Business School, The Leipzig Graduate School of Management in Germany, Wharton School of the University of Pennsylvania, the University of St. Gallen in Switzerland, of the Harvard Business School or of the Sloan School of MIT in the USA or the INSEAD in France, Singapore and Abu Dhabi as these world famous schools teaching the subject of management first appeared in the 19th and 20th century.

However, we must note that those who consider management as a modern discipline are correct to the extent that they use as landmarks the historic contributions and publication of management theories in early 20th century. We should also note that some pioneer management theories were introduced by authors trained as engineers, and later others by social scientists and academics.

In this respect, Clegg, S.R., Kornberger, M. and Pitsis, T.S. (2016) in their book titled ‘Managing and Organizations: Introduction to Theory and Practice (4th Ed) are offering to students of management and other disciplines as well as to members of the broader interested public a wealth of information presented in a provocatively creative and aesthetically inviting manner.

The '*classical approach to management*' is based on and includes the writings and theoretical formulations of Henri Fayol, Frederick W. Taylor, Frank and Lilian Gilbreth, and Max Weber. The aim of these theorists was toward improving organizational efficiency in order to increase production and productivity.


The pioneer classical management theories included the '*administrative management approach*' of Fayol who was an engineer, the '*scientific management approach*' of Taylor who was also an engineer and the '*Bureaucratic management approach*' by Weber who was a sociologist-economist.

The '*neoclassical approach to management*' started with the historic Hawthorne Experiments. The experiments were carried out by a Harvard University team of researchers under the supervision of George Elton Mayo and his assistant Fritz J. Roethlisberger in cooperation with William Dickson who at that time was the Head of the Department of Employee Relations of the General Electric plant at Hawthorne, in Cicero, Illinois.


The Hawthorne experiments brought to the forefront the '*human relations approach*' to management and the '*organisational behaviour*' orientation.

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1.1 A QUICK GLIMPSE AT THE PROTAGONISTS OF THE CLASSICAL AND NEOCLASSICAL APPROACHES

Henri Fayol (1841–1925) was a French mining engineer and corporate manager who outlined his theory of management in several articles and in a book published in 1916 originally in French and then in English with the title '*General and Industrial Administration*'.

Fayol's contribution to management theory, referred to by some as '*Fayolism*', falls in the category of the so-called Administrative Management Approach.

Frederick W. Taylor (1856–1915) was an American mechanical engineer and manufacturing manager whose monograph titled '*The Principles of Scientific Management*' published in 1911 revolutionized organizational theory and initiated a movement known ever since as '*Taylorism*'.

Taylor's contribution to management theory falls in the category of the so-called Scientific Management Approach.

Frank (1868–1924) and Lillian Gilbreth (1878–1972) laboured to optimize production and productivity by carrying out research focused on the motions required by a worker to complete a specific task or job. By reducing all motions involved to the lowest possible level they proceeded to eliminate some unnecessary motions and proposed methods of doing the same task or job with fewer motions.

The Gilbreths work was ultimately combined with the work of Taylor who measured time needed to complete a task or a job on the production line and so the classic '*time-motion*' studies were introduced. The Gilbreths' work falls in the category of the Scientific Management Approach.

Max Weber (1864–1920), the eminent German sociologist-economist, explained the capitalist system of a market-driven economy by combining economic sociology with the sociology of religion. His historic and widely referenced monograph originally published in German was translated and was published in English with the title '*The Protestant Ethic and the Spirit of Capitalism*'.

Weber introduced his interpretive thesis that the capitalist system of production owed its existence to the Protestant religious values which can be simplified into the concepts of '*working hard and saving part of the wages earned*'.

Weber's contribution to management theory falls in the category of the so-called Bureaucratic System Approach.

George Elton Mayo (1880–1949) the Australian born psychologist and Harvard Business School Professor conducted the historic Hawthorne Studies at the Hawthorne plant of Western Electric Company located in Cicero, Illinois which was mentioned above.

Searching for methods to improve worker productivity by manipulating environmental variables Mayo and his team discovered that what seemed to matter most in the workers' motivation to improve their productivity were not so much environmental variables such as lighting, or cleanliness but rather human concerns as feeling to belong to a group, or being attended to by concerned management.

Mayo and his team's work establishing that human-emotional variables were more significant for the workers than merely financial rewards and environmental conditions culminated in giving rise to the so-called 'Human Relations Approach' and set the beginning of organizational behaviour research and theory.

1.2 HENRI FAYOL'S ADMINISTRATIVE MANAGEMENT APPROACH (FAYOLISM)

In his ground-laying work outlined in several papers and in his textbook published initially in French and later on in English with the title '*General and Industrial Administration*', Fayol outlined 5 basic functions and 14 principles of management, which are briefly presented below:

The Five Functions

1. Planning,
2. Organizing,
3. Staffing,
4. Directing,
5. Coordinating/controlling

It should be noted that the controlling function merges with the coordinating function as it places emphasis on the managers' need to have feedback so that they may become aware of deviations to the set work program and make proper adjustments as needed. Contemporary management and business administration texts preserve, in their core, Fayol's principles of planning, organizing, leading and controlling adding the function of forecasting.

The Fourteen Principles

1. *Division of Work*, (improved efficiency and increased productivity can be expected by clearly defining the scope of work and improving worker's skills)
2. *Authority and Responsibility*, (authority provides the right to act, give orders and demand obedience while it carries along an appropriate sense of responsibility)
3. *Discipline*, (the methods for achieving discipline vary among different organizations but they exist and are enforced as needed securing employees respect and obedience to the rules of the organization)
4. *Unity of Command*, (this assures that specific supervisors issue commands to specific employees)
5. *Unity of Direction*, (in the process of achieving their prescribed goals employees aiming at the same direction should have only one supervisor coordinating their activities)
6. *Subordination*, (the interest of the organization supersedes the interest of every employee or groups of employees)
7. *Remuneration*, (fair wages including financial and non-financial compensation should be given to all persons employed as workers or managers)
8. *Centralization*, (this refers to the proximity of workers to decision making persons or groups)

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9. *Scalar chain*, (the line of authority from top management level to the lowest ranking employee is referred to as the organizations' chain of command)
10. *Order*, (a proper designated place is accorded by systematic differentiation to men, machines and materials)
11. *Equity*, (managers should be fair to staff at all times, maintaining discipline and kindness)
12. *Stability of tenure of personnel*, (managers should ensure employee stability as high employee turnover is detrimental to organizational efficiency and productivity)
13. *Initiative*, (improved efficiency, work satisfaction, motivation and high productivity occur when the organization and management permit employees to exhibit initiative, innovation and creativity)
14. *Esprit de corps* (high levels of cooperation along with improved productivity can be expected when the proper psychological atmosphere of team unity and harmony is created and maintained)

1.3 F. W. TAYLOR'S SCIENTIFIC MANAGEMENT APPROACH (TAYLORISM)

Taylor introduced his ideas on scientific management breaking away from notions held at his time that industrial, assembly line type of production does not lend itself to proper study, analysis and relevant evaluation of performance measured by set goals and realized end-results.

In essence, Taylor sought to and managed to put an end to the prevailing 'rule of thumb' type of manufacturing introducing scientific methodology to the manufacturing process. He did not, however, limit his theoretical view exclusively in manufacturing but contended that it could and should be easily and fruitfully extended to educational institutions and to public administration.

Taylor's 'scientific management' theory could be summarized to include four basic principles, namely:

1. *The introduction and development of a true science of industrial production management*
2. *The establishment of scientific methods for selection and placement of workers*
3. *Training, educating and preparing workers for their jobs using scientific techniques*
4. *Creating intimacy and friendliness in the cooperation of supervisors and workers*

Taylor's theory aimed to optimize the levels of performance of workers and machinery in the large scale production assembly lines resulting in improved productivity and, hence, improved profits. As we noted above, his theoretical scheme when applied to real life settings ended the 'rule of thumb' production estimates providing management with realistic, scientific measures of productivity.

Using his analytic techniques Taylor proceeded to break down each worker's job to the most elementary forms thus minimizing skill requirements for each job and time requirements for training workers to perform different task in the production line. His techniques in measuring time needed for completing a special task or job combined later on, as we already noted, with the techniques developed by Frank and Lillian Gilbreth in measuring the motions needed for completing a special task or job and ultimately developed into the so-called '*time-motion*' studies widely used in industry.

Taylor has been accused of viewing the individual worker as '*another machine*' in the production assembly line and, in essence, dehumanizing human labourers. He was also accused of separating workers into '*efficient and inefficient*' (or in a more vulgar form 'bright and stupid') categories. Furthermore he was criticized for not stating clearly in his writings how workers who contributed to increased productivity would be awarded a 'fair share' of the increased profits. His suggestions, however, for the need to provide 'work-rest breaks' benefited the workers by easing their physical or mental fatigue while, simultaneously, having them return to their work posts somewhat refreshed it helped improve productivity levels.

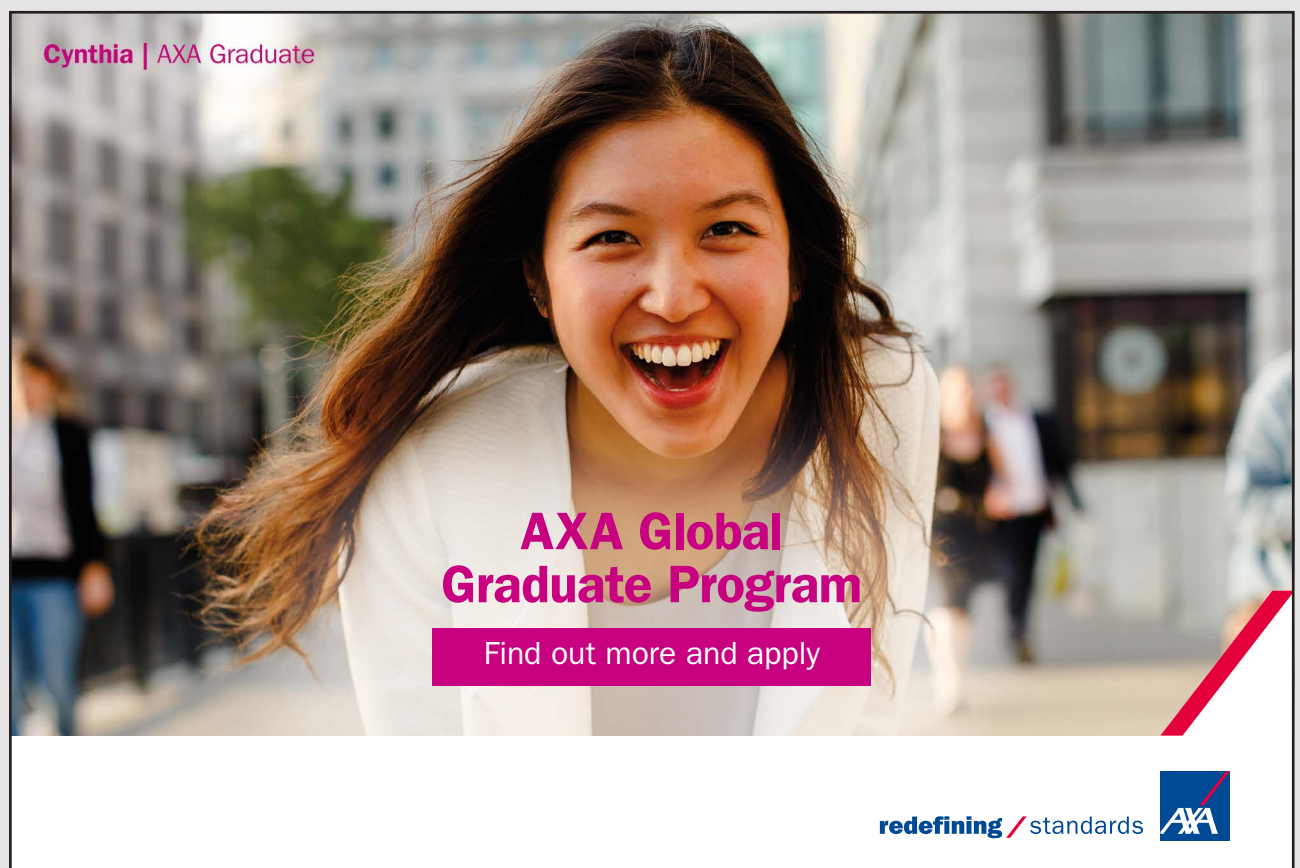
1.4 MAX WEBER'S BUREAUCRATIC MANAGEMENT APPROACH

Weber theorized on the management of large scale bureaucratic organizations in both industrial production and public administration introducing clearly specified hierarchies of authority and responsibility in complex organizations and social structures.

Weber's model of a bureaucratic system provided large scale organizations with the needed stability, rational order and clearly delineated roles of persons located at the various levels of their hierarchy.

In this bureaucratic scheme managers were provided with the needed authority to require adherence and to obtain adherence to rules and policies. Some critics of Weber's scheme have emphasized the view that such rigidly structured systems although they assure stability and smoothness in operation end-up stifling managers' and employees' creativity and forbid exhibition of '*charismatic leadership*'.


Indeed some modern critics of Weber's Bureaucratic model have raised issues with the need to adhere to set rules, regulations and policies which trap managers '*in the box*' and thus prohibit them of thinking '*outside the box*' in order to face challenges and problems characterizing the modern globalized system of capitalist economies.



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2 THE SHIFT OF FOCUS TO HUMAN RELATIONS IN MANAGEMENT THEORIES

In the theoretical schemes of management presented above it should be readily obvious that the emphasis was placed on improving productivity and production levels and increasing the profits of the companies which employ both the production workers and the managers who supervise them.

What was not so readily obvious and, hence, little discussed was the point of view expressed by some critics of the original management theories that workers were viewed as part of the production apparatus, as machines, which stripped them off their human nature and diminished considerably the idea of proper motivation for proper behaviour on the production site.

To put it in another way, the critics were calling attention to the idea that the wish to be creative on the job exists within our human nature as an innate need, and therefore workers, if motivated properly by management, could end up being more productive and hence more useful to management and especially company owners than merely being pushed to act within set limits and work parameters.

Obviously the fermentation of some innovative ideas based on human relations had been put into motion and what was now needed was some new theory that could substantiate them and prove their usefulness for all players involved in the production theatre, namely workers, managers and company proprietors.

2.1 GEORGE ELTON MAYO'S WORK AND THE DAWN OF THE HUMAN RELATIONS APPROACH

As already mentioned, classic approaches to management theory and practice focused, almost exclusively, on the jobs of workers and supervising managers leaving little, if any, room for other social and psychological intervening factors motivating them to improve their individual and group performance.

The Australian born Harvard Business School professor George Elton Mayo (usually encountered in publications as Elton Mayo) and his research team worked between the late 1920s and early 1930s using as their 'research stage' the Hawthorne plant of the Western Electric Company located in Cicero, Illinois.

Professor Mayo and his Harvard Business School team of researchers headed by his assistant Fritz Roethlisberger and with the cooperation of Hawthorne Works plant manager William Dickson conducted experiments identified as '*the Bank wiring room observation study*', '*the Relay assembly room experiments*', '*the Illumination experiments*' and '*the Mass workers interviewing program*'.

Mayo's theoretical conceptualization was that along with, or in a parallel fashion to, the observable and existing organizational structure there exists an informal pattern of social relations among workers which, when properly identified and utilized could contribute to the benefit of management and ownership as they would improve the productivity of workers.

The Hawthorne experiments brought forth the discovery that workers, as human beings, respond more readily to socio-psychological motivators including group and interpersonal dynamics and less to small compensation increments and improvement of physical conditions in the workplace environment.

Critics of the Hawthorne experiments and the conclusions drawn from the researchers' findings centred on the lack of rigor, lack of careful delineation of the tested variables and of the meaning and significance of the so-called '*Hawthorne effect*', i.e. the claim that people tend to behave differently when they realize that they are being studied or are under observation.

The Human Relations approach encompassing the organizational behaviour orientation is multidimensional and multidisciplinary engaging sociology, psychology, anthropology and other social sciences in providing heuristic interpretations of individual and group behaviour and establishing the critical motivators for improving human performance in large scale industrial production and public administration organizations.

2.2 ABRAHAM MASLOW'S PYRAMID OF THE HIERARCHY OF HUMAN NEEDS

In his classic paper published in the Psychological Review in 1943 Maslow presented his 'Theory of Human Motivation' which has come to be schematically presented as a pyramid.

Maslow's pyramidal hierarchy of needs (which he also termed 'deficiency needs') placed at its base, the bottom level of the pyramid, the so-called 'physiological' needs, namely air, food, water, clothing and shelter.

Once these needs are met and satisfied to the individual's judgement, the next level of needs containing the safety needs, stable health, personal and financial security become the motivators for the individual's behaviour.

On the third level of the pyramid Maslow placed the needs for belonging and love, which involve interpersonal relations such as friendship, intimacy, family as well as group belonging in the work site or in leisure time.

The fourth level includes the human need for esteem and self-respect as the person strives for status and recognition, personal achievement and social prestige.

Once the first four levels of needs are satisfactorily met, the individual may strive to ascend to the fifth level, referred to and termed as '*self-actualization*' which has been variously defined and presented as the aim for one to become what one can be, to become the most one can be, to realize his or her full potential as a person in a given socio-economic, cultural and psychological environment.

Going beyond the original article with the 5-level pyramidal hierarchy of needs Maslow further advanced and solidified his theory in his book published under the title '*Motivation and Personality*' in 1954 where he added and highlighted his belief that humans possess an innate '*curiosity need*' which channels and guides some aspects of our behaviour.

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2.3 HERZBERG'S AND LIKERT'S CONTRIBUTIONS TO THE HUMAN RELATIONS APPROACH

The general framework of the Human Relations Approach was made public and was articulated in Mayo's book '*The Human Problems of an Industrial Civilization*' and Abraham Maslow's article on '*The Theory of Human Motivation*'. Mayo's and Maslow's work served as an impetus for the work of Frederick Herzberg (1923–2000) and Rensis Likert (1903–1981) and some others.

Herzberg's contribution to the Human Relations Approach to Management was his so-called '*two factor theory*' including what he termed '*hygiene factors*' and '*motivation factors*'.

The '*hygiene factors*' relate to environmental characteristics of the work setting as well as the organizational culture in which the individual exists and functions as an employee. While negative environmental and organizational conditions such as poor work environment, low salaries, job insecurity, and authoritarian supervision may lower workers' productivity, positive hygiene factors may stabilize, but will not improve, workers' dedication to their jobs and to higher output.

'*Motivation factors*' can be both *extrinsic* (management style and organizational culture provide motivators such as recognition, promotion, increased levels of responsibility) and *intrinsic* (relating to the individual's subjective needs to succeed, to excel and to realize full personal potential).

The reader will recognize some similarities in Herzberg's theory to Maslow's theory relating to the concepts and ideas of basic needs and self-actualization.

Likert distinguished and defined four different types of management, namely:

The Exploitive-Authoritative style where supervisors have little respect for their subordinates' abilities and motivation and resort to the use of fear and punishment to achieve their desired production or performance goals.

The Benevolent-Authoritarian style simply adds supervisors' concern for their subordinates in a 'master-slave' type of relation where production and performance are aided by provision of some rewards

The Consultative style where supervisors and superiors do admit that their subordinates have some basic sense of responsibility and motivation but they do not have absolute trust in them and,

The participatory-group involvement style where supervisors and superiors have proper respect for their subordinates capabilities, dexterities, loyalty and motivation and they do take their suggestions into account and reward them appropriately thus creating the ultimate climate for improved work performance and increased productivity.

Likert has been credited with the creation of the well-known 5-point scale very widely used in assessing peoples' attitudes toward researched items. Posing the question they wish to have answered the researchers provide their subjects with 5 possible answers, namely: Strongly Disagree/Disagree/Neither Agree or Disagree/Agree/Strongly Agree.

2.4 MCGREGOR'S XY AND OUCHI'S Z THEORIES OF MANAGEMENT

Douglas McGregor publicly presented his theory in his 1960 book titled '*The Human Side of Enterprise*' and is ever since, usually, referred to as theories X, Y. In his book McGregor has made a notable attempt to differentiate between the classic and the modern views of management.

'*Theory X*' refers to the traditional view of exercising direction and control relying on the impersonal, condescending and demeaning view of workers and employees as lazy and responsibility avoiding human beings who need strong, authoritarian supervision in order to return to their employers their wages or salaries worth.

'*Theory Y*' refers to the integration of organizational and individual goals and the viewpoint that for humans, as workers or employees, work can be rewarding and as enjoyable as play, and that if treated with proper respect and trust workers and employees will be motivated to give their best to their jobs while being positively and creatively participative in the organization's aims and goals.

More than half a century old McGregor's theoretical postulations and applied suggestions still continue to have significant impact on training modern managers and introducing and cultivating corporate cultures.

William G. ‘Bill’ Ouchi is credited with the introduction of the so-called ‘*Z theory*’ (which appears as an alphabetical extension to McGregor’s X, Y theories). This was an attempt by the Hawaiian – American professor of management to explain the Japanese model of management to the American and other western publics.

The readers of our book should be made aware that in the 1980s the Japanese ‘*economic miracle*’ was being realized in the flooding of the world markets with high quality and competitively priced goods, from TVs and home appliances to automobiles, and was the subject of debates and rigorous discussions in academic amphitheatres, corporate headquarters and in the Mass Media.

In his book published in 1981 with the title ‘*Theory Z: How American Business Can Meet the Japanese Challenge*’, Dr Ouchi emphasized his point that the Japanese management success was not based on, nor was the result of, superior technology. Japanese management’s successes were based on the adoption and implementation of a special corporate culture which integrated and interfaced highly competitive and well trained middle and upper level supervisors and managers with well-respected and dedicated employees who were actively involved and fully participating in the processes of taking and implementing minor and major management decisions.

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Ouchi pointed out the fact that part of the success had to do with employee loyalty and, as employees were satisfied and rewarded for their efforts, they would confirm their appreciation towards management by choosing to be permanent in their jobs and staying with the company that employed them for their whole career.

In '*theory Z*' guaranteed life-time employment meant that management was assured of employee long-term loyalty and vice-versa employees' guaranteed tenure employment in their chosen company.

We should bring to the attention of our readers that Japanese culture does lend itself to such levels of mutual loyalty between management and employees. Indeed, Japan has always been a society placing significant emphasis on the family as a fundamental social institution and the Japanese are well known for their unchallengeable historic loyalty to their Emperors and the Imperial Order.

PART TWO – EDUCATION FROM ANTIQUITY TO PRESENT TIMES

1 THE GREEK IMPRINT ON EDUCATION

It is not an exhibition of ethnocentric attitudes on our part as individuals of Greek descent that we will begin this chapter of the book focusing on Greek antiquity which is considered by scholars worldwide to be the birthplace and the cradle of the processes of education and of western civilization.

Starting with chapter 2 of this part of the book we will expand our focus of attention to ancient civilizations of the near East and ultimately of the Far East.

1.1 EDUCATION IN ATHENS AND SPARTA

The current debates on methods of teaching, processes of learning and general strategies of education can be, easily and reliably, traced back to antiquity with the main focus in the Mediterranean basin points being primarily Athens of the 5th century BC, a period known also as 'the golden age' and Rome as it evolved into the Roman Empire.



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Etymologically the word 'school' is a Latin rendition of the Greek word 'σχολή' which originally meant '*leisure*' but ultimately acquired the meaning of '*doing something, as teaching, learning and philosophizing*' during leisure time in a set, structured environment.

The question that was asked, and was answered, two and a half millennia ago continues to relate to the core theme underlying present education philosophy, ethics and strategy:

Education and acquisition of knowledge for what reason and towards what end?

The Athenian educational paradigm relates mainly to three figures:

Socrates, who is widely accepted as one of the most influential educators in western civilization. He lived and taught in Athens (469–399 BC), directly influenced Plato (427–347 BC) considered by some as his most prized student and indirectly influenced Aristotle (384–322 BC) who, in turn, was considered as Plato's most prized student.

The Athenian educational legacy in discovering the truth and acquiring knowledge by learning evolved into three distinct conceptual categories:

Socrates developed the '*dialectic*' method through which he would claim ignorance for a specific subject and discussing it with others through the process of '*dialogue*' would ultimately reach a definitional consensus for the subject.

He used to claim that like his mother, who was a practicing midwife, he was nothing more than a '*spiritual midwife*' helping bring forth knowledge which already existed within each individual.

Widely known as the '*Socratic method*' this type of teaching has been through the centuries and continues to be used by some teachers today. Acting within the purview of the '*Socratic method*' and leaving aside the classic type of lecturing some contemporary teachers pose a seemingly simple question on a specific topic and as students express their views and ideas new ways of examining and seeing the topic emerge to the benefit of all participants.

Socrates did not author any treatises but his theories and teachings have been passed on in the writings of his students, notably Plato, and to some extent Aristotle and others.

Plato, was the son of a wealthy-aristocratic Athenian family and his given name was Aristocles. 'Plato' was his nickname referring to his wide-framed physique. As a *rationalist* he held the notion that through the process of learning, truth can be reached by introspection and self-reflection since, basically, truth lies within each one of us.

Plato's Academy served as the fundamental model of schooling for almost a millennium and, contrary to the prevailing attitudes of those times, it admitted women as pupils and was 'tuition-free' surviving financially entirely on voluntary fees paid by the families of its students.

Aristotle was Plato's favourite student in the Academy despite the fact as it has been written that he had frequent and serious arguments with his teacher. As an *empiricist* he proposed that in seeking knowledge we should be using our senses and learn by observing the world and its phenomena outside ourselves.

Aristotle, as some of our readers may already know, served for several years as the teacher to young Prince Alexander (son of King Philip II of Macedon), has been credited with the development of logic and left a legacy with his strong emphasis on data analysis as a means for reaching the truth.

Teaching the young was not done exclusively at Plato's Academy, but was also done by 'experts' who appeared in affluent Athens in the second half of the 'golden age' and were labelled '*sophists*' (and charged fees for their teaching services). The term '*sophist*' emerges etymologically from the Greek word '*sophos*' and '*sophia*' (σοφός – σοφία) meaning '*wisdom and knowledge*' and referring to the person who possesses knowledge or expertise in a specific field.

Sophists came to Athens and taught affluent young Athenians a variety of subjects including 'rhetoric' charging, as we noted above, fees for their services. Protagoras, who eventually befriended Pericles the leading figure in Athenian politics and protagonist at the era of the '*Golden Age of Athens*', was among the most distinguished sophists.

Ultimately, however, knowledge became too large as it encompassed a variety of fields making it impossible for one person to acquire and transmit it to pupils. Hence, the school emerged and evolved into an organization where many teachers co-existed passing on to their pupils the specialized field of knowledge each one of them had acquired through their preparation at college and university level.

The Athenian model of education aimed at preparing the young generation to become good citizens capable of performing their roles in both times of peace and times of war. Schools were mostly private, tuition fees were charged and they accepted and enrolled exclusively male students.

‘*Paideia*’ (also frequently spelled in English as ‘*Paedeia*’) originating from the Greek word ‘*παιδεία*’ was the formidable education process developed and applied by Greeks in antiquity aiming to prepare the ‘right citizen-man’ for the city-State (in Greek the ‘*πόλις*’). The concept originates from the Greek verb ‘*παιδεύω*’ which meant to teach, to train the young providing them through contemplative learning the necessary knowledge required by Athenian citizens.

For Plato, the creator and director of the Academy and Aristotle the creator and director of the peripatetic school ‘*paideia*’ encompassed all subjects of knowledge nowadays placed under the title of ‘*liberal arts education*’ and was provided to the children of the affluent Athenian citizens. On the opposite side for Isocrates and the sophists education was synonymous with what we currently define as ‘*vocational training*’ and was provided to non-citizens and slaves.

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Boys and girls were trained at home by their parents and by educated servants till they became 6 years old. Boys went to attend 'primary school' from age 6 to 14 and their basic education was considered complete by the age of 16. Sometime between the age of 18 and 20 the boys were exposed to military training in the Army or the Navy. All school teachers were male and the basic subjects taught were what for the last few centuries in Great Britain and the USA and other English speaking countries has been referred to as '*the 3 Rs*' (reading, writing and arithmetic) despite the fact that the last two words do not start with an 'r', as well as Music and physical education.

Girls stayed at home and, basically, learned how to become 'good wives and mothers.' Girls were excluded from the education that boys received in the schooling system, but some wealthy Athenian families employed specialized tutors providing their daughters with an education which for all practical purposes was almost equivalent to that received by boys in high quality schools.

The Spartan schooling system, contrary to the education system of Athens which aimed at preparing educated citizens, aimed at preparing 'soldiers' capable of defending their city and, if and when needed, attack an enemy.

Preparation for becoming 'good soldiers' was provided also to girls although Spartan women did not go to the battlefields either defending motherland or offending an enemy.

Furthermore, contrary to the prevailing Athenian practice which placed women at a lower educational and social rung than men, Spartan women held equal status with Spartan men.

At this point we feel that it is fitting and proper to make a brief note relating to the process of eugenics and '*selection of the fittest*' in the Spartan society which cannot be fully proved or fully disproved although it 'fits well' in the militaristic ways of schooling and living in ancient Sparta.

Through the ages there existed a myth related to the alleged practice of Spartans to have each and every infant examined by a panel of experts to determine their physical well-being. When and if judged as '*small and weak*', in the practice of exercising infanticide the infant would be taken and left to die at a hillside or would be thrown down the infamous 'Kaiadas' chasm at Mountain Taygetos.

Archaeological excavations of this area of Sparta have revealed remnants of bones and skulls of adults but not of infants leading to a legitimate challenge of widespread killing of infants that, due to their physique, could not grow up to be bodily healthy adults and capable soldiers.

Relevant historical writings do make references to the practice of '*infanticide*' when a child was judged to be weak or crippled among many ancient tribes and societies. However, the references to the chasm of 'Kaiadas' at mountain Taygetos from where human beings were thrown off the steep cliffs leading to their death, based on archaeological excavations findings, seems to relate more to criminals found guilty and punished by death thrown off the steep cliffs rather than infants *killed* if judged unfit to grow up normally and be capable soldiers.

1.2 EDUCATION IN ROME

The consensus among historians, educators and social scientists in general appears to be that the Roman education system was a replica of the ancient Greek education system based mainly on the Athenian model.

Unlike the Athenians' practice, Romans had both boys and girls participating in the educational training processes. However, girls usually stopped attending school or participating in lessons provided by private tutors earlier than boys as they were expected to go into marriage and child bearing as soon as they entered adolescence.

Educated Greek slaves or freemen, in addition to Romans, offered their services as teachers and tutors in the courts of wealthy Roman families. Ultimately, at the historic Roman Empire period formal schools made their appearance financing their operation by the fees they charged and collected from students' families.

The Roman educational system, as many historians have asserted, aimed mostly at preparing citizens capable of building aqueducts and roads and able to serve in the Armies of the Roman Empire. Indeed soldiers were needed for the Roman Legions as the Empire expanded and gained control in most areas of the Mediterranean basin, in Southern and North Europe, in the Near East and the north shores of Africa after conquering Carthage and subduing Egypt.

1.3 EDUCATION IN OTHER MEDITERRANEAN CULTURES, BABYLON AND PERSIA

At the time the Athenians were experiencing the influence of towering philosophical figures such as Socrates, Plato and Aristotle and their counterparts, the Sophists such as Protagoras and Isocrates, acquisition of knowledge through schooling was not available to the general population in other geographic regions located either at the Western or Eastern Mediterranean basin.

In the west Carthage and the Carthaginian culture and in the east Egyptians and Hebrews, in Mesopotamia the Babylonians and further east the Persians did not provide education to the general population but only exclusively to small groups of boys from the financially privileged classes. In these societies the girls, as was the custom in Athens and other parts of the Mediterranean basin, were excluded from receiving education and stayed home learning from their mothers and female house servants the roles and duties of being a woman, a wife and a mother.

In essence, education in Egypt, Babylon and Persia was provided to a select few (always boys and not girls) who were educated with the objective to be prepared to undertake roles either as public servants and bureaucratic scribes for the ruling classes or as priests and servants in religious orders while some of them trained as physicians, engineers and architects.

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2 EDUCATION IN ANCIENT FAR EAST: CHINA AND THE INDIAN SUBCONTINENT

2.1 EDUCATION IN CHINA

We will politely beg the readers' understanding and forgiveness as we begin in a somewhat unorthodox manner, our brief presentation of the Chinese educational system of antiquity with a reference to a well-known and globally widely used Chinese proverb which states:

'Give a young man a fish and he will have food for a day. Teach a young man to fish and he will have food for a lifetime...'

Proverbs are considered as repositories of popular wisdom, usually and surely not scientifically validated, but enabling the observer to gain some understanding of the cultural values held by various population groups in a variety of societies. In this respect the above proverb brings forth the Chinese people's consideration of the significant value of training and education as they relate to survival.

As relevant historical sources signify, the Chinese society had instituted one of the oldest formal educational systems over a millennium before a similar one was introduced in Athens but did not provide for the education of all its children as the majority of them were taken by their parents to the fields and assisted in agricultural or husbandry activities.

A small number of children attended private schools where the aim was to distinguish the most gifted and indeed, those graduating with high scores (something equivalent to American and British SAT's or GCSE's) were ultimately employed as civil servants in the service of the Emperor and the Chinese Imperial order.

Continuing with our laconic presentation of Chinese education it would not be an overstatement to note that for the Chinese society Confucius, Sun Tzu (the military philosopher) and Laozi (the founder of Taoism) enacted, as a whole, similar roles to those dramatized by Socrates, Plato and Aristotle in ancient Athens and in developing the Greek model of education and schooling.

Focusing our attention more precisely on two specific personalities it would not be an exaggeration to note that Confucius has been for the Far Eastern Civilizations what Plato has been for the Western civilizations. Confucius, however, had a strong belief in the capacity and propensity of all human beings to be 'just and good' while Plato's conception of human nature differed markedly and stood at the opposite side.

Making a brief parenthesis to our discussion we would like to bring forth our conviction that modern students of the social sciences, philosophy, political science and education should definitely familiarize themselves more than they already do with the basics of Plato and Confucius.

Confucius (551–479 BC) is considered China's great teacher and philosopher and one of the world's leading figures in education from antiquity to our days. His teachings were collected by his disciples in a slim volume called '*the Analects*' which has been translated into many languages while English was and remains the main referenced language. This historic fact brings to mind the great Greek philosopher Socrates who did not author any essays or books himself, but his main ideas were incorporated into the writings of Plato and others.

Confucius considered learning as a perpetual process demanding open mindedness as well as lots of perseverance and ultimately creative reflection on the knowledge gained. In this respect a reference should be made to the Socratic dictum '*I learn as I age*' (expressed by some as '*live and learn*') which outlines the idea that learning never ceases and continues to be a dynamic process till death.

For Confucius continuous learning and educational training should culminate in the creation of the '*Confucian gentleman or perfect man*' a concept related, in some ways to that of his ancient Greek philosophic counterpart Plato and the Greek's so-called '*Platonic philosopher-King*'.

We have already made above a brief reference to Plato's insistence on continuous training of students in his Utopian 'city-state' (Πολιτεία) until the point at which '*philosopher-kings*' would be prepared and who ultimately would be appointed as the State's Guardians, as its Governors.

Plato's '*philosopher-King*' remained mostly a theoretical concept in his utopian 'Republic'. Confucius, however, was instrumental in preparing and delivering highly trained civil servants responsible for running the State affairs as employees of the Chinese Emperors.

It is true that many modern teachers employ the Confucian method of teaching not realizing that they are doing so as they use imagery (nowadays, thanks to IT, we have power point slide shows) in order to enhance their verbal presentations. Relevant here is Confucius' statement indicating *'I hear and I forget, I see and I remember, I do and I understand.'*

Siddhartha Gautama 'Buddha' was another great teacher in the Far Eastern civilizations but, unlike Confucius, he was also considered a great religious figure.

The word 'Buddha' originates in the Sanskrit language and it means *'the awakened one'* referring to the person who has come to successfully perceive the true nature of the human mind and who does understand the world and all those elements which comprise *'objective reality'* i.e. everything that lies outside one's self.

Born in the far eastern region of the sub-continent of India, the area geographically covered today by Nepal, Buddha became more influential in China, Korea and through Zen-Buddhism in Japan. He had limited impact and influence in India where Hinduism, as a way of life and thought, prevailed and was 'controlled' of the Brahmins, an Indian cast protecting sacred learning as priests and teachers.

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Buddha's life from birth to death has not been precisely defined by historians who place his presence in this world somewhere between the 6th and 5th centuries BC. Buddha, in a manner reminding us of Confucius in China and Socrates in Athens, did not leave any written essays or books but his teachings were written down by disciples (Buddhist monks), several centuries after his death.

Buddha's educational philosophy and schooling methods placed specific emphasis on the gradual exposure of pupils from elementary to more complex knowledge since understanding and wisdom do not occur as sudden events but are reached through progressive learning and accumulation of knowledge. All knowledge improves immensely and becomes more useful combined with practice.

Buddhism today, when assessed and measured by large masses of followers, is encountered mainly in China, Thailand, Vietnam, Myanmar, and in smaller numbers (Buddhist communities with less than 12 million people) in Sri Lanka, South Korea, Taiwan, Cambodia, Japan and India.

Sun Tzu (544–496 BC) was another Chinese sage who has left a legacy relating to military training with his book titled '*The Art of War*' from which many ideas have been extracted and are still the focus of many analyses and discussions in military academies through the world. Sun Tzu's teachings relate more to the style of life, educational philosophy and schooling system of ancient Sparta (which as you recall from our previous discussion was a militaristic society) than to those of ancient Athens.

Lao-Tzu, whose birth and death dates remain uncertain, was another sage whose name literally means '*old master*' in ancient mandarin language and his little booklet titled '*Dao de jing*' is considered to be the fundamental reference work for Taoism and a classic short philosophical treatise of the Taoist movement.

In closing this chapter on education in ancient China we will note that Japan was exposed to the Chinese educational philosophy and schooling methods through the familiarization of the Japanese (whose religion was 'Shinto', etymologically meaning '*the way of the gods*') to the Chinese scriptures and the fundamental teachings of Confucianism and Buddhism.

2.2 EDUCATION IN INDIA

The main educational system in the Indian sub-continent was influenced by the prevailing religion of Hinduism. In India education was not seen as a process readily available to the masses but as a very special process involving a teacher (usually a Brahmin) and a small group of select students. Ancient Indian education aimed to create enlightened men. Girls did not participate in the education process but stayed at home learning from their mothers the duties of womanhood as mothers, child bearers, wives and cooks.

In the Indian education students would sit around the teacher and recite Vedas repeatedly until they would master at least one of the many. Indeed the knowledge containing books known as the Upanishads come from a Sanskrit word meaning '*students sitting close to the teacher-master's feet*'.

Education, as the schooling process for the very few who were receiving it, was provided free of charge either at the Teacher-master's home, or at Hindu sites such as monasteries or temples. Some historians make references to the so-called '*Gurudakshina*' the fees paid by some wealthy Indian families to Hindu Temples and teachers as fees for their children's education.

If some of the readers of our book would decide to undertake the task of examining and studying various historical and philosophical texts they would most certainly encounter some provocative similarities between some Platonic concepts and some concepts found in the Upanishads.

Such similarities have led to the hypothesis that some fundamental Hindu concepts were acquired by Pythagoras when, as some unverified myths have suggested, he had supposedly travelled to India (and then he passed them on to his student Plato) or when, again according to some unverified myths, some Indian philosophers-teachers visited Athens and exchanged ideas and knowledge with Socrates.

As such references are extremely hard, if not outright impossible, to verify we will leave matters at the proverbial dictum of the '*meeting of great minds*' as we have done discussing conceptual and philosophic similarities between Plato and Confucius and end any further elaboration of these matters.

3 WESTERN EDUCATION FROM THE DAWN OF CHRISTIANITY TO THE 20TH CENTURY

3.1 GRADATIONS IN THE ATHENIAN AND ROMAN EDUCATION SYSTEM

The Athenians had created some basic gradations in the schooling of the children of affluent families starting with early childhood and continuing up to late adolescence when young men participated in philosophical training set forth by disciples of Plato and Aristotle.

As the military supremacy of Athens and other Greek cities kept on deteriorating while the Romans were conquering the areas around the Mediterranean basin and towards the North and Western European continent, the Athenian educational system started to flourish in Rome where as we have noted earlier many teachers of the children of affluent Roman families were Greek freemen or Greek slaves.



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Starting with the defeat of Spartans and Macedonians by the Romans in the second century BC and continuing for several centuries including the first half millennium AD, which coincided with the supremacy of the Roman Empire over most of the Mediterranean basin, some formal gradations of the education system materialized and were adapted by Romans. These gradations of schooling existed until the demise of the Roman Empire towards the end of the 5th century AD.

3.2 EDUCATION IN MEDIEVAL TIMES AND RENAISSANCE

During the '*middle ages*' which are variably placed by historians roughly from the 6th to the 15th centuries AD, education came gradually and systematically under the control of the Christian Church. During this epoch, the Vatican prevailed in Rome and Western Europe and Constantinople in the Eastern Empire known also as the Byzantine Empire borrowing its name from the ancient Byzantium.

During the '*middle ages*', medieval education in addition to the classic subjects taught to pupils and students, incorporated Christian theology as a very significant part of the educational system in the European continent, the Mediterranean basin and near Eastern geographic areas controlled, as noted above, by the Roman Vatican in the West and the Patriarchate of Constantinople in the East.

Religious influence in education was the exclusive and universal domain of the prevailing Catholic and Eastern Christian Churches incorporating the study of the Holy Bible consisting of the New and the Old Testament.

During the 7th century AD following the teachings of the prophet Muhammad (considered by Muslims as the last true prophet of God) Islam became an influential educational pillar for the Arabs and the Arab world and the Holy Koran (or *Qur'an*) served as the basis for Muslim education.

In the course of 'medieval times' knowledge was transmitted by monks and priests to their pupils and students in monasteries, churches and rudimentary schools while all types of technicians and tradesmen were trained through the system of apprenticeship receiving '*on-the-job*' instruction.

During the Renaissance a challenge rose to the absolute control and supremacy of the Catholic Church's influence on the process of education (from primary level to the Universities which, starting in the 12th century, were created and controlled by the Church).

The religious emphasis on rote knowledge transmission by monks and priests was challenged by the introduction of the ancient Greek concept of ‘*liberal education*’ guiding young minds toward the exploration of arts and humanities.

Copernicus (1473–1543) introducing his theory and insisting that the Sun and not the Earth was the centre of our Solar System came to a head-on collision with the Catholic Church challenging one of its fundamental beliefs. Martin Luther (1483–1546) introduced his beliefs and notions on education insisting that knowledge should be secularized placing emphasis on individual inquiry and discovery.

The challenges to the traditional beliefs of the Catholic Church and its grip on the education system and the schooling process continued with Rene Descartes (1596–1650) who revived the Platonic ideas for ‘innate knowledge’ and John Locke (1632–1704) who re-introduced the Aristotelian empiricism with his concept of ‘*tabula rasa*’ meaning that a child’s mind is a blank tablet which is ultimately filled-in with experiences the child acquires on the road to adolescent and young adulthood.

Jean Jacques Rousseau (1712–1778) focused on the child, celebrated childhood and introduced the notion that education should be shaped around the children and not be imposed upon them permitting them to learn life by experiences gained in their life.

For some education historians Rousseau’s ideas were the point of reference and his theories served as the springboard for modern education theorists. Among them well known are the American philosopher, psychologist and educational reformer John Dewey (1859–1952), the Italian physician and educator known for the pedagogical theory that bears her name Maria Montessori (1870–1952), and the Swiss psychologist known for his pioneering work in children’s’ cognitive development Jean Piaget (1896–1980).

3.3 THE INDUSTRIAL REVOLUTION AND SCHOOLING FOR THE NON-PRIVILEGED CLASSES

The Industrial Revolution which historians, economists, sociologists and other social scientists consider to have originated in England in the 1780s covered the late 18th and the 19th century and saw the transformation of European and American agrarian societies into urban and industrial societies.

It may sound strange to some of our readers but it is a given reality that the English attempted to prohibit export of knowledge related to industrial production in the textile and iron industries but this, despite its rigor, proved to be a futile effort. By early 19th century industrialization and knowledge of massive factory creation of products spilled over eastward to the continent, Belgium, France and Germany and westward to North American States. By mid-19th century industrialization was a reality in Europe and the USA and, indeed, early in the 20th century the USA emerged as the world's most industrialized Nation.

Prior to the 1800s children of well to do families were provided tutorials at home by teachers who were considered specialists in various subjects. Children of less well to do and poorer families had no access to education until the early 1800s when a series of laws were passed in Britain providing some hours of schooling for financially non-privileged children.

Mass production of goods required a massive labour force and while parents were employed in factories children, when they were not exploited as helpless human beings involved in '*child labour*', had to be taken care of. In this manner nurseries for children under five years of age and elementary schools for children 6 to 11 years of age were set up by local authorities in England and later on in continental Europe and some of the States in the USA.



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PART THREE – EDUCATION IN THE 21ST CENTURY: A WORLDWIDE VIEW

1 THE UNITED NATIONS 1959 UNANIMOUS RESOLUTION ON THE RIGHTS OF CHILDREN

The universal assumption, as clearly stated by the United Nations resolution number 1386 (XIV) unanimously voted on 20 November 1959 by all UN member-States (numbering 78 Nations at that time) is that each Nation must insure that each and every child has specific rights one of which is the right to education. (Declaration of the Rights of the Child, G.A. res. 1386 (XIV), 14 U.N. GAOR Supp. (No. 16) at 19, U.N. Doc. A/4354 (1959))

The 1959 UN resolution has its roots in the 1924 League of Nations 'Geneva Declaration' outlining, for the first time in History, the rights of children.

In UN Resolution number 1386 one of the specified children's rights concentrates on education, i.e. the guaranteed right for every child irrespective of its family's socio-economic status to participate in and receive proper schooling so that it may grow physically, emotionally and intellectually and acquire knowledge, skills and dexterities that will help it blossom as a personality, adapt and survive in the society in which the child is reared.

We will continue our discussion of schooling and education in the next chapter, but at this point we deem it necessary and useful to present to the readers of our book the 10 principles of the rights of children as outlined in the relevant UN resolution (as presented on the internet by the University of Minnesota, Human Rights Library (<http://hrlibrary.umn.edu/instree/k1drc.htm>))

Preamble

Whereas the peoples of the United Nations have, in the Charter, reaffirmed their faith in fundamental human rights and in the dignity and worth of the human person, and have determined to promote social progress and better standards of life in larger freedom,

Whereas the United Nations has, in the Universal Declaration of Human Rights, proclaimed that everyone is entitled to all the rights and freedoms set forth therein, without distinction of any kind, such as race, colour, sex, language, religion, political or other opinion, national or social origin, property, birth or other status,

Whereas the child, by reason of his physical and mental immaturity, needs special safeguards and care, including appropriate legal protection, before as well as after birth,

Whereas the need for such special safeguards has been stated in the Geneva Declaration of the Rights of the Child of 1924, and recognized in the Universal Declaration of Human Rights and in the statutes of specialized agencies and international organizations concerned with the welfare of children,

Whereas mankind owes to the child the best it has to give,

Now therefore,

The General Assembly

Proclaims this Declaration of the Rights of the Child to the end that he may have a happy childhood and enjoy for his own good and for the good of society the rights and freedoms herein set forth, and calls upon parents, upon men and women as individuals, and upon voluntary organizations, local authorities and national Governments to recognize these rights and strive for their observance by legislative and other measures progressively taken in accordance with the following principles:



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Principle 1

The child shall enjoy all the rights set forth in this Declaration. Every child, without any exception whatsoever, shall be entitled to these rights, without distinction or discrimination on account of race, colour, sex, language, religion, political or other opinion, national or social origin, property, birth or other status, whether of himself or of his family.

Principle 2

The child shall enjoy special protection, and shall be given opportunities and facilities, by law and by other means, to enable him to develop physically, mentally, morally, spiritually and socially in a healthy and normal manner and in conditions of freedom and dignity. In the enactment of laws for this purpose, the best interests of the child shall be the paramount consideration.

Principle 3

The child shall be entitled from his birth to a name and a nationality.

Principle 4

The child shall enjoy the benefits of social security. He shall be entitled to grow and develop in health; to this end, special care and protection shall be provided both to him and to his mother, including adequate pre-natal and post-natal care. The child shall have the right to adequate nutrition, housing, recreation and medical services.

Principle 5

The child who is physically, mentally or socially handicapped shall be given the special treatment, education and care required by his particular condition.

Principle 6

The child, for the full and harmonious development of his personality, needs love and understanding. He shall, wherever possible, grow up in the care and under the responsibility of his parents, and, in any case, in an atmosphere of affection and of moral and material security; a child of tender years shall not, save in exceptional circumstances, be separated from his mother. Society and the public authorities shall have the duty to extend particular care to children without a family and to those without adequate means of support. Payment of State and other assistance towards the maintenance of children of large families is desirable.

Principle 7

The child is entitled to receive education, which shall be free and compulsory, at least in the elementary stages. He shall be given an education which will promote his general culture and enable him, on a basis of equal opportunity, to develop his abilities, his individual judgement, and his sense of moral and social responsibility, and to become a useful member of society.

The best interests of the child shall be the guiding principle of those responsible for his education and guidance; that responsibility lies in the first place with his parents.

The child shall have full opportunity for play and recreation, which should be directed to the same purposes as education; society and the public authorities shall endeavour to promote the enjoyment of this right.

Principle 8

The child shall in all circumstances be among the first to receive protection and relief.

Principle 9

The child shall be protected against all forms of neglect, cruelty and exploitation. He shall not be the subject of traffic, in any form.

The child shall not be admitted to employment before an appropriate minimum age; he shall in no case be caused or permitted to engage in any occupation or employment which would prejudice his health or education, or interfere with his physical, mental or moral development.

Principle 10

The child shall be protected from practices which may foster racial, religious and any other form of discrimination. He shall be brought up in a spirit of understanding, tolerance, friendship among peoples, peace and universal brotherhood, and in full consciousness that his energy and talents should be devoted to the service of his fellow men.

2 NURSERY, KINDERGARTEN, PRIMARY AND SECONDARY SCHOOLS

On a world-wide basis there appears to be a broadly accepted pattern concerning the exposure of children to the education system of the country in which they live and in which they are raised. Details of children's participation in the schooling processes are clearly spelled-out in each and every country's Local, Regional or National Ministry or Department of Education guidelines, rules, regulations and laws.

According to this world-wide encountered pattern, almost as a rule children around the globe attend nursery and kindergarten up to the completion of their 5th year of age.

These early childhood education programmes across the globe are usually designed to support and facilitate children's physical, cognitive, social and emotional development and help them adjust to groups of peers who they interface with outside their sibling and their families.



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Primary education programs are initiated between the children's 5th and 7th year of age and up to their 11th or 12th year of age at which time they go on to secondary schools.

Programmes at the primary school level, known world-wide as literacy and numeracy programmes are typically (although there always exist variations) designed to provide the children with fundamental knowledge, understanding and handling of skills in reading, writing and arithmetic (or mathematics).

Beyond these dexterities children are helped in developing social and emotional skills, are exposed to national and international geography, history and government-political concepts preparing them for participation to the secondary education level of schooling.

The first stage of secondary education level (sometimes referred to as lower secondary or junior high school level) commences usually between the ages of 10 and 13 years with age 12 being an almost universal standard. This level of education is mandatory in almost every Nation of the Globe.

The second stage of secondary education (sometimes referred to as upper secondary or senior high school level) aims as a rule to prepare children for entry to tertiary (college or university level education) or provide them for marketable skills if they choose to go out to the labour market and not to tertiary level education.

It must be made clear at this point, however, that there are various exceptions to the above described schooling types among Nations on a worldwide basis but, in general, this scheme seems to be the backbone for the organizational structure of kindergartens, primary and secondary schools.

Schooling on a broad, world-wide scale is mandatory in most Nations until the age of 16 at which point in many countries around the globe the adolescents may continue in preparatory schooling leading to their entrance into a University study program. In other instances students may opt to attend a so called '*college*' or '*professional*' school in which they usually acquire work and professional skills and relevant dexterities enabling them to enter the labour market as apprentices or novices.

Although schooling is mandatory up to the middle adolescent years of a child's life it is true and, as the authors of the book you are reading and many other educators across the Globe characterize as utterly shameful, even today on a worldwide basis, literally countless millions of children are not attending school but are forcefully lead into illegal child labour.

According to relevant statistics of the International Labour Organization (ILO) the global number of children in child labour in 2013 has declined by one third since 2000, dropping from 246 million to 168 million children. Surely for Mankind of the 21st century this reality although it appears as an improvement in numbers continues to be an utter shame.

Even more shameful and tragic is the fact that more than half of these children, namely 85 million, are engaged in hazardous work (this dramatic number is down from the more tragic number of 171 million in the first year of the 3rd millennium 2000).

Asia and the Pacific Nations still have the largest numbers engaged in child labour (almost 78 million or 9.3% of the child population), but Sub-Saharan Africa continues to be the region with the highest incidence of child labour (59 million, over 21% of the child population).

There are 13 million (8.8%) of children in child labour in Latin America and the Caribbean while in the Middle East and North Africa this number is 9.2 million (8.4%).

Agriculture remains by far the most important sector where child labourers can be found to be present (98 million, or 59% of all children involved in child labour), but the problems are not negligible in the services (54 million) and industry (12 million) encountered mostly in the informal economy. Child labour among girls fell by 40% since 2000, compared to a drop of 25% for boys.

Going beyond the tragic realities of child labour we should note that there are various exceptions to the above described schooling types, namely kindergarten, primary and secondary, among all Nations on a worldwide basis. However, despite the existence of some variations, this gradation scheme seems to be prevalent as the blueprint for the structure of schooling on a worldwide basis today.

3 BRIEF PRESENTATIONS OF SCHOOLING SYSTEMS AROUND THE GLOBE

Looking at the school systems in different countries across the Globe it becomes easily apparent that the typical model of education encompasses for all children a few years of nursery care and kindergarten participation followed by entry to primary or elementary education which starts between the ages of 5 and 7 and usually has a duration of up to 6 years.

The second stage of education, again in almost a global scale, is the so-called secondary or high school education which is typically separated into two cycles each with 3 years duration, termed lower and higher secondary schooling levels or junior and senior high school levels.

The vast majority of Nations have adopted the United Nations Children's rights resolution and as a rule in the last few decades at least 9 years of compulsory education is available to all children and it is provided free to all.

In the following sections we will make brief presentations of the schooling systems in selected Nations across the globe using as an arbitrary, but easily identifiable criterion for our choices, each Nation's ranking according to its annual Gross Domestic Product (GDP). Although this choice may, beyond its arbitrary nature, appear also somewhat biased as it seems to separate so-called 'rich' from 'poor' Nations we feel that GDP is a useful criterion as education is provided free and so it absorbs substantial financial resources from each Nation's annual budgets.

4 SCHOOLING SYSTEMS IN SELECTED EUROPEAN COUNTRIES AND RUSSIA

The European Commission's EACEA (Education, Audio-visual, and Culture Executive Agency) and the 'Eurydice Network' includes 38 Nations participating in the Erasmus + programme (28 European Union member States and 10 cooperating Nations). The cooperating Nations in alphabetical order are the following: Albania, Bosnia and Herzegovina, the Former Yugoslav Republic of Macedonia, Iceland, Liechtenstein, Montenegro, Norway, Serbia, Switzerland and Turkey.

The schooling structure that was outlined above which includes the pre-schooling, primary and secondary levels, excepting some minor variations, characterizes the education systems of these 38 Nations.

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The European continent is made up of 51 independent States and among them, geographically, the largest one is Russia which, along with Kazakhstan, Azerbaijan, Georgia and Turkey are considered transcontinental States since parts of their geographic entities belong to Europe and some to Asia.

In this section we will make a brief presentation of the schooling systems of the 5 top European Union Member States based on their economic rank as measured by the 2015 Gross Domestic Product (GDP). We are adding to these five the two South European Member States of the EU, namely Portugal and Greece where annual GDP due to imposed austerity measures is currently under 180 billion euros. We will include in this section a brief view at the Russian schooling system.

4.1. In Germany the education system is relegated to the Authorities of the 16 Federal States (Laender) which have charted their own departments and educational policies. Schooling in Germany today, following the kindergarten years (usually ages 3 to 6) which is not provided free can be summarized as follows:

Primary or elementary schooling for all children begins at the age of six which is considered as the first year of a *Grundschule*. In the vast majority of cases attendance runs for four consecutive years at the end of which children transfer to one of four different types of secondary schools.

Secondary level I may be found to consist of any of the following: *Hauptschule* (Klasse 5–9 or 10), *Realschule* (Klasse 5–10), *Gymnasium* (Klasse 5–10), or *Gesamtschule*. When students finish the Secondary level I, they can obtain a leaving certificate and/or the *Mittlere Reife* examination. Depending on the qualification certificate they obtain, they can then start work, participate in vocational training, go to a vocational school, or continue in/transfer to a Gymnasium.

In most federal states, students spend five years at the *Hauptschule*. The main objective of the *Hauptschule* is to prepare students for their entry into the world of work. Once students have obtained their *Hauptschulabschluss* (leaving certificate) at the age of 15–16, they can go into vocational training, start entry-level work in the public sector, or attend a full-time vocational school known as *Berufsfachschule*.

Students attend the *Realschule* for 6 years. It gives them a broader general education and expects them to show greater independence. In comparison with the Gymnasium, the pupils are given a more vocationally-oriented education. At the end of *Klasse* 10 they obtain the *Realschulabschluss* (leaving certificate), which provides them with a variety of options: in-company vocational training, work in the public sector at entry and executive level, or further school-level education at secondary level II or at a *Fachhochschule*.

Students attend the Gymnasium for eight or nine years before they take their final examination (*Abitur* or *Hochschulreife*). The Gymnasium is designed to provide students with an education which will enable them, once they have passed their *Abitur*, to study at a German university or equivalent. Students at secondary level II (the last two or three years at the Gymnasium) select two or three *Leistungskurse* (specialist subjects). Their *Abitur* grade or mark is based on the assessment of these *Leistungskurse* and the two additional subjects they have elected.

The *Gesamtschule* (comprehensive school) combines elements from the *Hauptschule*, the *Realschule* and the Gymnasium. This type of school was introduced later than the others. Students usually spend six years at the *Gesamtschule* and can obtain either a *Hauptschule* or a *Realschule* 'leaving certificate'. Students wishing to sit the *Abitur* attend the school for additional three years.

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4.2. In the United Kingdom schools are overseen by the relevant Department for Education. Local government authorities are responsible for implementing policy for public education and state-funded schools at a local level. England also has a tradition of independent schools (sometimes termed ‘public schools’) and Home schooling. The Law permits parents the freedom of choosing to educate their children by any means suitable to them.

The state-funded education system is divided into stages based upon age: Early Years Foundation Stage (ages 3 to 5); primary education (ages 5 to 11), subdivided into Key Stage 1 (KS1) Infants (ages 5 to 7) and Key Stage 2 (KS2) Juniors (ages 7 to 11); secondary education (ages 11 to 16), subdivided into Key Stage 3 (KS3; ages 11 to 14) and Key Stage 4 (KS4; ages 14 to 16), post-16 education (ages 16 to 18); and tertiary education (for ages 18+).

At age 16 the students typically take exams for the General Certificate of Secondary Education or other Level 1 & 2 qualifications. While education is compulsory until the age of 18, schooling is only compulsory to 16, thus post-16 education can take a variety of forms which may be academic or vocational. This can involve continued schooling, known as ‘sixth form’ or ‘college’, leading (typically after two years of further study) to A-level qualifications (similar to a high school diploma in some other countries), or a number of alternative Level 3 qualifications such as BTEC, the International Baccalaureate or the Cambridge Pre-U. It can also include work-based apprenticeships or traineeships, or volunteering.

4.3. In France education is compulsory from ages 6 to 16. Prior to that many children are placed at the care of nurseries from the time they are a few months old till the age of 3 and subsequently enrol in kindergarten known as the *Ecole Maternelle* from the age of 3 to the age of 6.

Primary schools in France known as the *Ecole primaire*, or the *Ecole élémentaire* resemble those of many other countries and children attend them from age 6 to age 11.

In France secondary or middle school is aimed for pupils aged 11–15. The *collège unique* is the backbone of the French school system. The *collège* was designed to provide all pupils with a fundamental secondary education, after which a certain degree of specialisation usually follows.

Practically speaking, French pupils are frequently oriented during their *collège* years either towards general classes, from which they will be expected to continue their education in a traditional *lycée*, or towards more technical classes, after which they will be expected to take an exam called the *brevet* (a kind of examination which resembles the GCSE).

After this exam pupils can either stop their secondary education (if they have reached school leaving age), or continue in a *lycée professionnel* which is a vocational high school.

The traditional French *lycée* covers the last three years of secondary education, i.e. ages 15 to 18. There are two main types of traditional *lycée*, the *lycée général* or the *lycée classique*, and the *lycée technique*. The main function of the *lycée* is to prepare pupils to sit the *baccalauréat* (or bac.) exam, which educators outside France consider to be the equivalent of the British 'A' levels.

At a *lycée professionnel* (*lycées pro*), students work towards qualifications to help them get a manual or clerical job or pursue further vocational studies. These qualifications are the *baccalauréat professionnel* (*bac. pro*), CAP (*certificat d'aptitude professionnel*) and BEP (*Brevet d'enseignement professionnel*), focusing on one of 4 fields of employment: social/health, driving/transport, catering/hotels, and optics.

Finally, the so-called *lycées du bâtiment* and *lycées agricoles* as the meaning of the French words indicate specialise in building trades and agriculture. The professional baccalaureate requires three years of study and certifies the student to gain employment in a qualified professional activity.

4.4. In Italy education is compulsory for all children from 6 to 16 years of age, and is divided into five stages: kindergarten (*scuola dell'infanzia*), primary school (*scuola primaria* or *scuola elementare*), lower secondary school (*scuola secondaria di primo grado* or *scuola media*), and upper secondary school (*scuola secondaria di secondo grado* or *scuola superiore*).

From the age of three to the age of six, children are sent to nursery schools and kindergartens. This type of pre-schooling is non-compulsory, but most Italian families chose to send their children to a Kindergarten known as *all'asilo*. Children in Italian Kindergartens, as happens to be the case in most other countries, learn to socialize as they interact with age peers within a group away from the siblings and family and acquire rudimentary understanding of alphabet letters and arithmetic numbers.

Primary school (*Scuola Primaria* also known as *scuola elementare*), has a duration of five years. The educational curriculum is the same for all students who are provided the fundamentals in Italian, English, mathematics, natural sciences, history, geography, social studies and physical education, visual and musical arts.

Secondary school (*Scuola secondaria*) lasts 8 years and is divided into two phases: *Scuola secondaria di primo grado* (Lower secondary school), also broadly known as *Scuola media*, which corresponds to the Middle School grades, and *Scuola secondaria di secondo grado* (Upper secondary school), also broadly known as *Scuola superiore* or less formally as *Le Superiori*, which corresponds to the senior high-school level encountered in other countries.

The *scuola secondaria di primo grado*, (lower secondary school), follows primary school and lasts three years (roughly from age 11 to age 14). The *scuola secondaria di secondo grado*, (upper secondary school), lasts five years (roughly from age 14 to age 19). There are three types of *scuola secondaria di secondo grado*: *Liceo* (lyceum) – where the education received in a *Liceo* is mostly theoretical; *Istituto tecnico* – offering both a theoretical education and a specialization in a particular field of studies (for example economy, humanities, administration, law, technology, tourism.) and *Istituto professionale* – which covers the vocational schools preparing pupils for specific trades, crafts and careers. Some schools offer a diploma after 3 years of study instead of 5 years of study.

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It should be noted that any type of secondary school which has a duration of 5 years grants access to the final exam, called *esame di maturità* or *esame di stato* which takes place every year between June and July and, if successfully completed and passed, grants to the students access to university.

4.5. In Spain the school system foresees compulsory education according to the Nation's *Ley Orgánica de Educación* or Fundamental Law of Education, for all children from 6 to 16 years of age. Children are taken care of at nurseries and kindergartens from babyhood (a few months old to their 6th year) but these pre-schooling preparation stages are not compulsory.

Leaving *guarderia* (nursery school) at age 3 children enrol in the second stage of pre-schooling education known as preschool training *escuela infantil* which admit children from three to six years old and are usually attached to State run primary schools and are provided free of tuition.

Primary schools in Spain are known as *escuelas* or *colegios* and are compulsory requiring the children to enrol in the calendar year in which they turn six, and usually lasts until age 12. Primary schools are characterized by three, two-year stages or cycles, making a total of six academic years: *Primero ciclo*, this is the first cycle, for children 6–8 years old, *Segundo ciclo*, this is the second cycle for 8 to 10 year olds, *Tercer ciclo*, this is the third cycle for children aged 10–12 years.

After primary school, pupils go onto compulsory secondary education or *Educación Secundaria Obligatoria* (ESO) between the ages of 12 and 16, at an *Instituto de Educación Secundaria*, *Colegio Privado* or *Colegio Concertado*.

Secondary education is divided into two cycles: from 12 to 14 years and from 14 to 16 years of age. In both cycles, there are core compulsory subjects and optional subjects. If students complete the four years and pass successfully (*aprobado*) the expected exams they will be awarded a Graduate of Secondary Education Certificate or *Graduado en Educación Secundaria*.

Compulsory education ends at the end of ESO (*Education Secundaria Obligatoria*). When they reach the age of 16, students can choose to study for the *bachillerato*, undertake intermediate vocational training (*formación profesional* or *Ciclos Formativos*), which will be geared towards a specific job, or leave the school system completely. Some students combine lessons in school with workplace training in order to earn a *Certificado de Técnico* which can lead to a job, further training or onto *Bachillerato* studies.

4.6. In Portugal the schooling system is overseen and coordinated by the National Ministry of Education and Science, it is provided free to all children and foresees 9 year of compulsory education for all children lasting from age 6 to age 15.

Children in Portugal may attend nurseries until the age of three and then they can attend kindergarten *Jardins de infancia* from age 3 to age 6. If a child reaches age 6 by September of a given year (the month in which the school year commences) the child enters the compulsory level of schooling which is distinguished into three cycles and is known as *Ensino Basico*:

The first cycle corresponds to what is known in many other countries as primary school *escolas basicas* and lasts from the 6th year to the 10th year of a child's life.

The second cycle lasts from age 10 to age 12, the third cycle from age 12 to age 15 and both cycles are referred to as *Escolas secundarias* corresponding to the universal model of a secondary school.

At the end of the compulsory 9 year education pupils receive a degree attesting to their secondary school graduate status.

Adolescents wishing to continue with upper level secondary education enrol in 3-year programs between the ages of 15 and 18 and after successfully passing the appropriate exams they are awarded a professional diploma: *Diploma de Ensino Secundário, Certificado de Qualificação Profissional de Nível III*.

4.7. In Greece the education system is fully centralized and all of its levels, pre-school, primary and secondary fall under the auspices and control of the Ministry of Education, Research and Religion ('*Ypourgeio Paideias, Erevnas kai Thriskeumaton*'). Education is provided free to all children.

In Greece education from Grades 1–9, corresponding to ages 6–15, is free and is also compulsory. The primary school (*Dimotiko*) education is sub-divided into Pre-school Education and Compulsory Primary Education. The Pre-school Education is offered in kindergarten classes and the Compulsory Primary Education is given in Primary schools.

Secondary education is divided into two stages where stage 1 is the Compulsory Lower Level Secondary Education provided in *Gymnasiums* and stage 2 is the Post-compulsory or Upper Secondary Education level which is offered by the Unified Lyceums ('*Eniaio Lykeio*') and Technical Vocational Educational Schools (*Techniko Epaggelmatiko Ekpaideftirio – TEE* and *EPAL Eidiko Epaggelmatiko Lykeio*).



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The duration of studies in the so-called *Eniaia Lykeia* is three years and in the Technical Vocational Educational Schools (TEE and EPAL) two years (a' level) or three years (b' level). Graduates of EPAL can acquire a vocational license and enter the labour market or opt to enter tertiary level studies and if successful in passing the National Panhellenic Exams enrol in a TEI (Technological Educational Institute) or a University.

In the Greek schooling system children can opt to attend tuition charging private schools and, it should be noted that such schools exist on all levels of education starting with nurseries and kindergartens and continuing with primary and secondary schools (*Gymnasium/Lykeion*).

Prior to the current economic problems and austerity measures imposed on Greece after the summer of 2010 by the so-called *troika*, currently referred to as the *institutions* of its lenders (made up by the European Union, European Central Bank and International Monetary Fund) private schools were flourishing all over the country and many, having lowered their fees, continue to operate today.

Before closing this brief look at some of European Nations schooling systems we will take a brief glimpse at the Russian schooling system basing our selection as already mentioned above on the sole criterion of this country's Gross Domestic Product volume which ranks close to European Union's top member States economies.

4.8. In Russia the education system is organised and coordinated by the State, it is free and available to all children and while the vast majority of schools are State controlled and operated, some private schools have made their appearance in recent years in Moscow and other major cities.

Education in Russia usually begins with pre-school training before the age of six which, as is the case throughout the world, is not compulsory, and it progresses to the familiar three stages, namely, primary education, which lasts for four years; basic general education lasting for five years and secondary education which lasts for two to three years.

As is the case in all Nations globally, Russian general education is aimed at the intellectual, emotional, moral and physical development of the children. It aims to develop the abilities that will allow individuals to adapt to life in society as well as helping them to make conscious choices concerning their professional education.

General education is compulsory. The basic curriculum is made up by and includes some fields which are compulsory such as the Russian language, foreign languages, mathematics, history, politics, natural sciences etc. Every school designs its own curriculum, which is based on State requirements, and there may be provisions for some extra or optional disciplines. In Moscow, there are also schools that specialise in certain subjects, such as maths, music, arts, and sports. These schools can also offer extra education for children, alongside the general courses they may be enrolled in and attending.

After completing primary and basic general education, the students participate in designated final examinations. They are awarded a Certificate of Basic General Education, *Attestat ob Osnovom Obshchem Obrazovani*, which entitles the student to be admitted to either secondary general education, to vocational education or to non-university level higher education.

Upon completion of the secondary general education, the students need to pass the State final attestation (final examinations), after which they will be awarded a Certificate of Secondary General Education, *Attestat ob Sredem Obshchem Obrazovanii*. This school-leaving certificate will allow students to continue to higher education which may be either vocational education or both non-university and university level education.

Recently, new types of secondary schools have emerged called *gymnasium and lyceum*, which can be either State owned and controlled or private. The duration of studies can exceed that of secondary general schools, and the educational programmes can be more advanced.

In Russia today general education takes 11 years to complete. Children are enrolled in schools at the age of six and normally they finish school by the age of 17.

5 SCHOOLING SYSTEMS IN NORTH AND SOUTH AMERICA

USA and Canada comprise almost 80% of the territory of North America which has a total of 23 officially recognized member States. In this section we will take a brief look at the schooling systems of USA, Canada and Mexico as well as at 6 South American countries, chosen on the basis of our GDP criterion, which according to international data had the largest Gross Domestic Product as measured in US dollars, namely Brazil, Argentina, Colombia, Venezuela, Chile and Peru.

5.1. In the USA Education and the schooling system are not federally supervised but individual schooling systems exist in each one of the 50 States and a sum total of 14,000 local school districts across the Nation.



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Although the exact age of entry into the compulsory education system varies from State to State it is common, as is the case in other parts of the world, for the entry age to fall between the 5th and 7th year of a child's life. At the other end of the spectrum the end of compulsory schooling varies between the age of 16 and 18 but it is most often identified with the age of 16.

The students must reach age 18 for their education to be considered complete and this age does coincide with the completion of the 12th year of school attendance. The American schooling system is often time referred to as 'K-12' which is an abbreviation of 'Kindergarten to the 12th grade'.

Students who leave school at the end of compulsory education without earning a secondary (high school) diploma do not receive any certificate or recognition, and in most States they are considered to be secondary school '*drop-outs*'. Many such students later on in their post adolescent life attend remedial education or '*second chance high-schools*' and ultimately earn their high school diploma or an equivalency diploma.

It is common in many States, depending at the age at which pupils begin their formal schooling, that students may graduate a year earlier or a year later than the specified school-leaving time.

In most States 'gifted' students may reach graduation at a lower age than that foreseen by the relevant State education Laws and some less 'gifted' may be required to repeat one or more grades if they receive failing scores. School years in the USA are referred to as 'grades' and the length of primary education may vary from four to seven years, i.e. grades 1–4, 1–7.

Each State determines what grade range constitutes primary education, which is also referred to as 'elementary education'. According to its length, elementary education may be followed (or not) by a number of years of middle school education (most often three years) characterized and known as 'junior high school' in many States. This coincides with what in other parts of the world is known as lower secondary level of education and schooling.

Viewed as a whole, in total, secondary education takes place in grades 7–12, depending upon the laws and policies of each State and local school districts and the last three years are referred to as 'senior high school' which, again, coincides with the so-called upper secondary level in other parts of the world. There is no uniform National structure, curriculum or governing law but all States and school districts have set the secondary school graduation level as the completion of the 12th grade, and the common name for the secondary graduation qualification is the High School Diploma.

The High School diploma awarded in the USA is a title covering a variety of educational awards covering different curricula and educational standards.

5.2. In Canada, a bilingual (English and French) Nation, education is available to children in either of the two languages, it is compulsory after kindergarten and it is divided in the two worldwide familiar levels of primary and secondary education.

The Canadian schooling system resembles the schooling systems of many States of the USA and it includes pre-school or Kindergarten for children between ages 2 to 5, followed by what is known as 'elementary school' covering ages 6 to 11. Secondary education has two levels and it is divided into 'Junior High School' for children aged 12 to 14 and 'Senior High School' for children aged 15 to 18.

Although compulsory education stops at age 16 the overwhelming majority of Canadian students, except for 'drop-outs' and 'school leavers' stay on until they are 18 years old in order to complete their education and seek the award of a High School Diploma.

The education system in Canada is partially funded, not controlled but indirectly overseen, by the Federal Government and run by provincial and local governments. Children enrol into primary schools at either age 5 or 6 and their schooling is mandatory lasting until age 16 or 18 depending on the province in which they live.

In Canada students who successfully complete their compulsory, formal years of study receive a High School Diploma.

5.3. In Mexico the schooling system is funded and supervised by the Federal and local governments and is regulated by the Secretariat of Public Education which foresees compulsory education for all children between the ages of 6 to 14 years.

Mexican children attend pre-primary kindergarten (and nurseries) and enrol in the primary level school '*primaria*' which commences at age 6 and runs until age 12 at which point pupils enrol in the secondary level education 'junior high school' '*secundaria*' covering grades 7 to 9.

During their 15th to the 18th year of their lives students attend 'high school or gymnasium' which prepares them either for entry to tertiary-university level education, or provides them with special professional training so that they may enter the labour market as skilled workers or technicians.

5.4. In Brazil the schooling system is overseen and coordinated by the National Ministry of Education, provides free education to all children and is compulsory from ages 6 to 14.

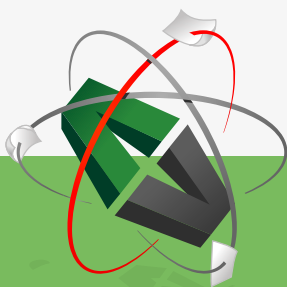
Nursery care up to age 3 and kindergarten for ages 3 to 6 'jardim' are also provided free while Primary school and lower secondary school years referred to as 'fundamental education' '*Ensino Fundamental*' last until age 14 and higher secondary education which is also provided free runs from age 15 to age 18 but it is not compulsory or mandatory.

5.5. In Argentina the Education system and schooling is overseen by the National Ministry of Education and it is provided free to all children.

Kindergarten is compulsory for one year before enrolment to primary school which lasts from the 6th year of the child's life to the 11th year. From age 12 to 15 students are enrolled in secondary education which at the low level lasts from ages 12 to 15 and at the higher level from ages 15 to 18.

Education in Argentina is compulsory for all children and lasts for 10 years including the one year of pre-primary schooling and the 9 years of primary and secondary level schooling.

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In the 3 years of enrolment into the higher secondary school, which as we noted above covers adolescents aged 15 to 18, students may choose their orientation aiming toward admission to colleges and universities, or toward vocational training in economic, commercial and technical subjects.

It should be noted that with a National literacy level of almost 98% of its population, Argentina ranks among the top Latin American countries owed to a significant extent to its compulsory and efficient education and schooling system.

5.6. In Colombia the schooling system is overseen and coordinated by the National Ministry of Education and it is compulsory for children between the ages of 5 and 15.

Schooling in Colombia lasts for 11 years and it is divided into 3 phases where phase one, the primary education level lasts for 5 years, phase two which is the lower secondary level lasts for 4 years and phase three, the upper secondary level lasts for 2 years.

Primary education '*Educación Primaria*' begins for most pupils at age 6 and lasts for 5 years. Secondary education runs for 6 years and it is divided into the lower secondary school '*Educación Secundaria Básica*' which commences for most pupils at age 11 and lasts until age 15 and upper secondary education '*Educación Media*' which lasts for 2 years and covers students aged 15 to 16. At this level students choose a 'track' which is either of an academic nature or technical/vocational nature, where the former leads to tertiary level education and the latter to acquisition of skills necessary to enter the labour market.

5.7. In Venezuela the schooling system is regulated by the National Ministry of Education. Education is provided free to all children and it is compulsory for 9 years with primary school starting at age 6. Children may be cared for in nurseries and they may attend kindergarten until the time they have reached the predetermined age for enrolment in a primary school.

Basic education comprises grades 1 through 6, middle education (lower secondary) takes place at grades 7–9 at the end of which compulsory education terminates. Higher level secondary education involves grades 9–11 and is referred to as 'diversified education' where students may choose their core subjects and aim toward admission to tertiary education or acquire basic vocational skills that will permit them to enter the labour market in the business/economics areas or in the technical areas.

5.8. In Chile schools are supervised and regulated by the National Ministry of Education which mandates that primary and secondary education is compulsory for all children.

Pre-primary schooling for children up to age 5 (nursery and kindergarten) is not compulsory but it is provided free to those families who desire to have their children participate.

Primary education commences for all pupils at age 6 and lasts till age 13 while secondary (or so-called middle education) starts at age 14 and lasts until age 17. During this 4 year study period students may choose to focus on sciences or humanities or opt to enter the labour market as technicians.

5.9. In Peru the schooling system is set, supervised and regulated by the National Ministry of Education and foresees one year of compulsory pre-primary schooling (kindergarten) for children when they are 5 years old and then entrance into the primary school at age 6.

Primary schooling lasts between the ages of 6 and 11 years, while at age 12 until age 16 students enrol into secondary schools. The 5 year study in the secondary school foresees 2 years of general secondary education followed by 3 years of academic secondary education (sciences, humanities and arts) or 3 years of technical vocational training.

6 SCHOOLING SYSTEMS IN SELECTED AFRICAN COUNTRIES

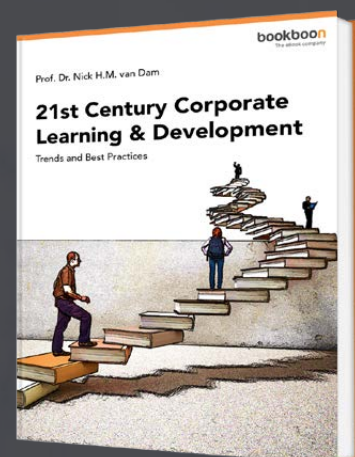
We begin this chapter by noting that the total number of independent States in the African continent is currently over 50. Egypt is geographically like Russia being the only African Nation which has its main geographic entity in Africa but it also has a small area of its national territory in the Asian continent.

As we have done previously with Europe and the Americas we will briefly present the schooling systems of the top 10 Nations of the African continent taking again as the criterion for their selection their annual GDP. It is true that with some African Nations (as is the case elsewhere in the world) annual GDP may fluctuate as their national currencies undergo devaluations but generally the largest top 10 economies are: Nigeria, Egypt, South Africa, Algeria, Morocco, Angola, Sudan, Kenya, Ethiopia and Tunisia.

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6.1. In Nigeria schools are controlled and supervised by the National Ministry of Education in cooperation with State and Local governments. International reports on the state of affairs in Nigeria have noted that there are serious differences in the quality of education provided to children of city dwellers as compared to the children of this Nation's vast countryside.

The school system in Nigeria is known as a 6–3–3 type schooling and is compulsory for 9 years after the children enter Primary school. The Primary school has a duration of 6 years; after this the next 3 years are devoted to lower or junior secondary schooling and the following 3 years to upper or senior secondary schooling.

Instruction during the first 3 years of Primary school is done in one of the 3 main native languages, i.e. Hausa, Ibo and Yoruba and the next 3 years with increasing countrywide prevalence instruction is done in the English language.

After completing their Primary school studies pupils continue with enrolment to the junior or lower secondary schooling for 3 years and with the completion of this stage compulsory education ends.

In upper or senior secondary schooling which also lasts for a period of 3 years students are able to choose academic subject orientation leading either to the tertiary level of studies or to technical scientific orientation which opens up the prospects for a place in the country's labour market.

6.2. In Egypt the school system is controlled and supervised by the National Ministry of Education and foresees compulsory education from ages 4 to 14 starting with 2 years of kindergarten, continuing with 6 years of Primary schooling and 3 years of preparatory or lower secondary school education.

The successful completion of the lower secondary school grants the pupils with the relevant *Basic Education Completion Certificate* and opens the path for students' participation in the upper secondary education tier which lasts normally for 3 years but may be extended to 5 years in the pursuit of special subjects. Secondary education may take one of three basic types: it can be general, it can be technical or it can be vocational.

6.3. In South Africa the schooling system is controlled and overseen by the National Department of Education which has two separate Education Ministries namely, the Basic Education which deals with primary and secondary education and the Higher Education and Training which deals with tertiary level education.

Schooling is compulsory for all South African children from age 7 (grade 1) to age 15 (completion of grade 9).

Primary school education runs for 6 years and middle school education for 3 years beyond the primary grades and this schooling period is compulsory for all children.

Secondary education runs from grade 8 to grade 12, it is not compulsory and as it involves certain cost it is not affordable for the children belonging to less financially fortunate or poor families.

6.4. In Algeria the school system is controlled by the National Ministry of Education, education is provided free and it is compulsory for all children between the ages of 6 and 15 years (corresponding to grades 1 through 9) and it is classified as primary schooling.

Secondary education which lasts for 3 years is designed for ages 15 to 18 (grades 8 to 12) and it is differentiated in two types, namely General Secondary Education and Vocational Secondary Education. Students are examined on a national level and if successful in meeting the set criteria they are awarded the '*baccalauréat de l'enseignement secondaire*' which is considered the key for entrance to tertiary education.

Vocational type of secondary education may last from 1 to 4 years and prepares students to enter the labour market as skilled workers in a variety of specialties and subjects.

6.5. In Morocco schools are supervised by the National Ministry of Education. The Moroccan school systems is differentiated into the primary level starting at age 6 and lasting until age 12, corresponding to grades 1 through 6; the middle or basic education level which lasts for 3 years age 12 to 15 '*Enseignement Fondamental*' corresponding to grades 7–9 and upper secondary which lasts for 3 years ages 15 to 18 '*L'Enseignement Secondaire*' corresponding to grades 10–12.

Secondary education in Morocco is differentiated as general secondary or technical secondary.

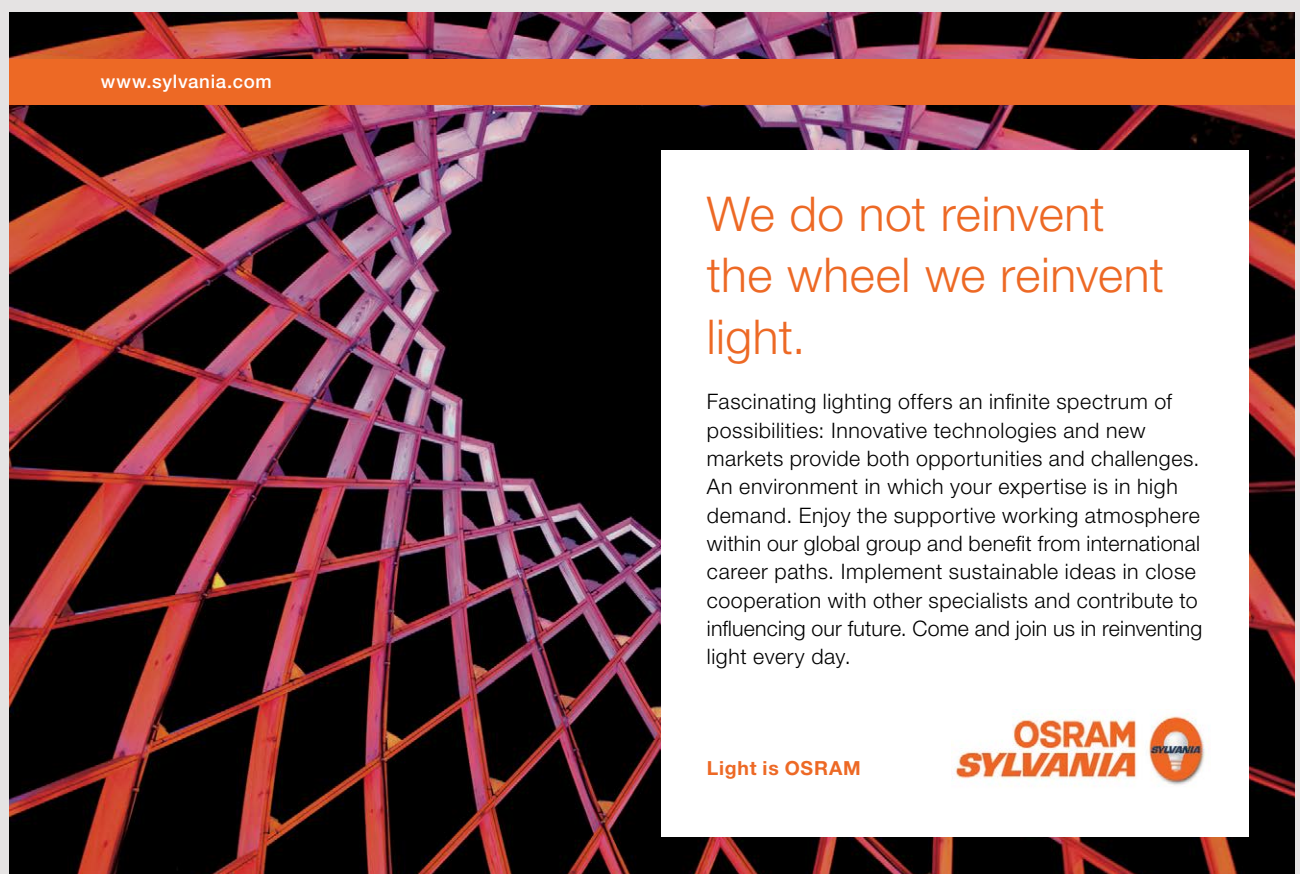
6.6. In Angola, a country torn by bloody and intense internal conflicts, education is supervised and coordinated by the National Education Ministry and foresees only 4 years of compulsory education at the primary level '*Ensino de Base*'. Schooling commences for every child at age 6 and lasts for 8 years until age 14 corresponding to grades 1–9.

Secondary education '*Ensino medio*' lasts for 3 years, covers grade 10–12 and is designed for students aged from 15 to 18 years. Successful completion and passing of the relevant State exams provides the students with the degree of '*Habilitações Literárias*'.

6.7. In Sudan, a bloody and intense civil strife torn country education is centrally supervised by the National Ministry of Education and foresees free and compulsory schooling for all children between the ages of 6 and 13. Primary education lasts for 8 years and is followed by secondary education which has a 3 year duration.

International reports point out the dire conditions of the country and the school system and some estimates indicate that only one in two children are enrolled in primary schools and only one in five in secondary schools and this is a reality representing mainly to the more 'safe' urban areas.

6.8. In Kenya the schooling system is centrally controlled and supervised by the National Education Ministry and foresees study of 8 years at the primary level including completion of a kindergarten and it is free to all children but it is not compulsory.




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Primary school includes grades 1 to 7. Pupils are between 5 and 7 years old when they commence their studies and continue until their 13th year of age. Middle or junior secondary schools entail grades 8 to 11 and ages 14 to 17, while secondary high school lasts for another 2 years.

6.9. In Ethiopia education is controlled and supervised by the National Ministry of Education and it is free and compulsory for all children.

Some children are admitted to nurseries and kindergartens before they reach their 6th year of age at which point all children enrol into primary or elementary schools which have a duration of 6 years.

Secondary education entails 2 years as junior middle school and an additional 4 years as senior secondary high school.

6.10. In Tunisia the education system foresees 9 years of study at the primary or elementary and the preparatory secondary level '*Enseignement de base*'.

The 9 years correspond to 6 years of study at primary school and 3 years at the preparatory secondary level. At the end of the 9 years of study students take the '*examen national de fin d'études de l'enseignement de base*' and those who are successful in passing the exam are awarded the national '*Diplôme de Fin d'Études de l'Enseignement*'.

Secondary upper education lasts for 4 years (comprises 2 two year cycles known as general academic and specialized). At this level of secondary education students are aged 15 to 19 years and upon completion they may choose to go on to tertiary level of study or to enter the labour market.

7 SCHOOLING SYSTEMS IN SELECTED ASIAN COUNTRIES, AUSTRALIA AND NEW ZEALAND

Asia is geographically the world's largest continent and is made up by 48 independent Nations while the smaller continent in the world is Australia and Oceania where there are 14 Nations the largest of which are Australia and New Zealand.

As we did in presenting school systems in Europe, the Americas and Africa we have chosen for presentation below a number of countries in Asia and Australia-Oceania based on their annual GDP.

For the Asian continent the countries selected are: China, India, Japan, Indonesia, South Korea, Saudi Arabia, Turkey, Iran, Thailand, Taiwan and Pakistan.

For Australia-Oceania the countries selected are Australia and New Zealand.

7.1. In China the education system foresees 9 years of compulsory education available free to all children of which 6 years are spent at the primary school level and 3 years in the so-called junior (middle) secondary level.

Children are enrolled in the primary school at age 6 or 7 while the 3 years of junior or lower secondary school (known as '*chuzhong*') are for pupils aged 12 to 15. Students completing their junior secondary school studies undergo specific exams in order to receive the relevant certificate of graduation.

After the completion of junior or lower secondary school students may choose to continue with senior (upper) secondary school which can have either an academic or vocational orientation. Senior academic orientation secondary school is known as '*gaozhong*' and has a duration of 3 years while senior vocational orientation secondary school known as '*zhongzhuan*' may last for 3 or 4 years.

7.2. In India the education system has its general schooling guidelines set by the National Council for Educational Research and Training (NCERT) while the 28 States and the so-called 7 'union territories' have their freedom in implementing educational programs and curriculum frames.

Education is compulsory for all Indian children up to the age of 14. The education system foresees 8 years of primary or elementary schooling which usually commences at age 6 and ends by age 14.

Secondary schooling lasts for 4 years from age 14 to age 18 and is separated into two 2 year cycles known as general/lower – standard secondary school (or '*standard X*') and senior upper secondary schooling (or '*standard XII*').

The secondary school curriculum includes, over and above other courses, the study of 3 languages namely, the regional language, English and a third language chosen by the students.

7.3. In Japan education and schooling follow the American model and begin informally with nurseries and kindergartens. At age 6 all children enrol in a primary or elementary school '*shogakko*' which has a duration of 6 years and runs until the pupils reach their 12th year of age.

After successful completion of the elementary or primary school, students enter the junior or lower secondary school '*chugakko*' which has a duration of 3 years and is included in the compulsory 9 year study period mandatory for all Japanese children.



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The upper or senior secondary school '*kotogakko*' has a duration of 3 years and is designed for pupils aged 15 to 18. Although this level of the educational system is neither compulsory nor free the vast majority of Japanese adolescents attend it. Students can choose either the academic orientation leading to entrance to tertiary level institutions or the vocational orientation which will equip them with skills necessary to enter the labour market. After completion of this 3 year stage students must pass specific examinations in order to obtain the relevant study completion certificate.

7.4. In Indonesia the schooling system is overseen and coordinated by the Ministry of National Education and foresees 9 years of compulsory education which is provided for all children and includes the 6 years long primary or elementary schooling and the 3 years long junior-lower secondary schooling.

Children's education commences informally with two years of kindergarten attendance '*Taman kanak-kanak*' from ages 3 to age 5 and at age 6 all children enter primary or elementary school '*Sekolah Dasar*' where they will stay for 6 years of study.

At age 12 students enter the middle or junior high school '*Sekolah Menengah Pertama*' where they will study for 3 years until they are 15 years old and that is where their compulsory education ends.

The upper secondary or senior high school offers the students the option of following a study stream leading to university entrance or acquiring vocational schools for entry to the labour market.

7.5. In South Korea the schooling system is overseen and coordinated by the National Ministry of Education. Schooling commences with kindergarten which is not mandatory and at age 6 all children are expected to enter primary or elementary school '*chodeung-hakgyo*' which lasts for 6 years.

Lower secondary or middle school '*jung hakgyo*' runs for 3 years for students roughly at ages 13 to 15 and high school level secondary education '*godeung haggyo*' which also lasts for 3 years is attended by students aged 15 to 18.

High school level education provides students with the choice of studying sciences, languages, literature or other academic curricula if their ultimate aim is to enter a university or prepares them vocationally to enter the labour market.

Vocational education, which after the War served as the backbone of preparing much needed technical personnel, is currently less appealing to the extent that only one out of every five High school graduates seek vocational training while four out of five enrol in universities. An explanation for this relates to the fact that in Korean society university graduates enjoy higher respect than vocational school graduates.

7.6. In Saudi Arabia schooling is controlled and overseen by the National Ministry of Education, it is free for all children and is differentiated in 3 broad categories, namely, primary, intermediate and secondary.

It should be noted here that schooling for Saudi children is not co-educational.

In Saudi Arabia kindergarten is not seen as a requirement but all children must enrol in a primary school when they are 6 years old. The primary school has a duration of 6 consecutive years.

The intermediate school lasts for 3 years; students enrol in it at age 13 and stay until age 16.

High school is attended by adolescents when they reach their 17th year and it has a duration of 3 years. Students have the option of continuing with general academic education leading to university study or switching to technical secondary schools in pursuit of vocational training which is provided for three distinct areas, namely agriculture, commerce or industry.

7.7. In Turkey schools are overseen and coordinated by the National Ministry of Education and all children have free access to 12 years of compulsory education usually in three cycles with a duration of 4 years each.

Children may attend nurseries and kindergartens but these are not considered part of compulsory education foreseen for children in Turkey.

Primary or elementary schooling begins at age 6. Primary education combined with middle school education runs for 8 years from ages 6 to 14.

Secondary education runs from ages 14 to 17 and is provided in general, vocational and technical high schools or Lyceums (known in Turkish as '*Genel Lise, Meslek Lisesi, Teknik Lise*'). At the completion of Lyceum study and after successful completion of the relevant exams graduates are awarded a Lyceum certificate/diploma ('*Lise Diploması*').

7.8. In Iran the schooling system is supervised and coordinated by the National Ministry of Education, foresees compulsory education at the primary or elementary level and is free for all children.


Children can enrol in kindergarten up to the age of 6 at which time they enrol to primary school '*Dabestan*' where they will receive elementary education until they reach their 12th year of life.

Secondary education runs in two levels each of which has a 3 year duration. Lower or middle school secondary education '*Rahnamayi*' which is for students aged 12 to 15 is part of the mandatory schooling and is used as a '*testing stage*' to determine students' learning aptitude and intellectual potential and guide them to the next level of upper secondary education.


The upper secondary schooling '*Dabirestan*' is for adolescents aged 15 to 18 (sometimes somewhat older) and is designed as a High School of three types: the theoretical, the technical-vocational/professional, and the manual skills '*Kar-Danesh*'. The latter two schooling types prepare students for direct entry into the job market in the trading, agricultural and industrial professions. The '*Kar-Danesh*' track is designed to develop semi-skilled/skilled workers, foremen, and supervisors.

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After successful completion of the high school secondary education level of study students receive a relevant diploma '*Diplom-Metevaseth*'.

7.9. In Thailand the schooling system is supervised and controlled by the National Ministry of Education, foresees 9 years of compulsory schooling for all children, it is provided free and is structured in the typical pattern of duration of 6–3–3 years of study.

Children usually attend nursery and kindergarten until they are 6 years old at which time they enrol in the primary or elementary school where they study for 6 consecutive years.

At age 12 children are admitted to middle education secondary school where they study for 3 years and upon its completion they finish their compulsory education.

After middle school students may attend another 3 years of upper secondary education designed for ages 15 to 18. At this level the students may concentrate on subjects leading to university level study or on professional/vocational subjects providing them qualifications for direct entry to the national labour market.

7.10. In Taiwan schooling is overseen and coordinated by the National Ministry of Education and compulsory study has a 9 year duration. Children may receive pre-school kindergarten training until the age of 6 at which time all children enrol in a primary or elementary school which has a duration of 6 years and ends at age 12.

Lower secondary or junior high school level entails 3 years of study and students enrol at ages 12 staying there until age 15. Students in Taiwan dedicate many hours beyond regular school hours acquiring additional knowledge that will enable them to progress to the next level of secondary education, the senior high school level, which they enter after successfully passing the nationally administered and supervised senior high school entrance exams.

Senior high school lasts for 3 years and is attended by students aged 15 to 18 who labour vigorously in order to succeed in being admitted to a University. Some students concentrate on vocational and/or professional subjects which will permit them to enter the labour market. Students who so desire may also follow specific coursework that will help them gain entrance to a university degree program related to the vocational program they received during senior high school study.

7.11. In Pakistan the schooling system is overseen by the Federal Ministry of Education in cooperation with Provincial Governments and conceptually includes pre-school training in kindergartens while primary school attendance commences at age 6 and lasts for 5 years.

Pupils then enter secondary school where the middle school lasts for 3 years and includes grades 6 through 8.

The upper secondary school level, known as high school, runs in grades 9 and 10 and when successfully completed provides students with the '*secondary school certificate*'.

Finally there is the intermediate (grade 11 and 12) level which after successful completion of attendance and passing of relevant exams entitles students to the '*Higher Secondary School Certificate*'.

Single sex schooling is pervasive in the country side but less so in urban centres where one encounters co-educational as well as single sex schools.

In Pakistan students have another schooling option available in the type of education known as '*technical education*'. This usually runs between grades 5 and 10 and provides students with practical professional and vocational skills so that they can enter the labour market directly.

7.12. In Australia schools are overseen and coordinated by the 6 States and the three Federal and seven External Territories which in total comprise the Commonwealth of Australia.

Schooling is generally free for all children and it is compulsory from ages of 5 or 6 years to 15 or 17 years. This age variation results from varying rules and regulations of the various States' and Territories' educational legislations.

Kindergarten and nursery-play ground pre-primary education varies in the different areas of the Commonwealth but, as a rule, compulsory education commences at the time children are 6 years old and they enrol in primary or elementary schools.

Primary schools run for 6 years until children reach age 12 at which point they enter the secondary, high school level of education which may last until age 18 or 19 (this age variation, again, comes as a result of varying State and Territory legislation).

High school secondary education prepares students for entry to university level study. States and Territories have made provisions for those students wishing to pursue vocational, professional and technical education leading to skill acquisition which will facilitate direct entry to the labour market.

7.13. In New Zealand the schooling system includes primary and intermediate as well as high schools and foresees free and compulsory education for all children between the ages of 6 and 16.

Pre-schooling starts with nurseries and kindergartens and most children enter primary school when they are 6 years old although it is not uncommon to find pupils aged 5 years who are enrolled in some primary schools. Primary schools run for 6 consecutive years (grades 1–6).

Going on to the secondary school level (middle school) the system provides that students may do grades 7 and 8 in their primary school or enrol in another so-called ‘*bridging school*’ before they progress to upper secondary or high school level which has a duration of 4 years.






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**PART FOUR – A SELECTIVE
WORLDWIDE VIEW ON
SPECIAL EDUCATION**

1 SCHOOLING FOR PUPILS WITH SEN AND DISABILITIES – A BRIEF PREAMBLE

In this chapter we will take a brief glimpse at the very sensitive category of schooling for children with Special Education Needs (SEN) which in generally accepted terms is defined as a state of physical, emotional or intellectual conditions which make it difficult (and in some cases impossible) for the child to be incorporated-integrated in a regular school system.

The term SEN (Special Education Needs) is also encountered in literature and on the internet as SEND (Special Education Needs and Disabilities). Both terms are used interchangeably.

A landmark of worldwide significance in the Special Education segment of general education for children and adolescents with SEN is the so-called ‘Salamanca Statement’.

This title refers to the statement unanimously adapted by the more than 300 delegates representing 92 Nations and 25 International Organizations who met in Salamanca, Spain from 7 to 10 June 1994 in a convention organized by the Government of Spain in cooperation with UNESCO.

The UN special report of the final session of the Convention on the Rights of Persons with Disabilities of 2006 which was fully ratified in early 2007 is considered as a milestone in this area.

Going beyond the general description of children with SEN and Disabilities given above, it is customary for each and every country to have passed its own Laws describing the problems that some children and adolescents have and prescribing the appropriate methods in dealing with them.

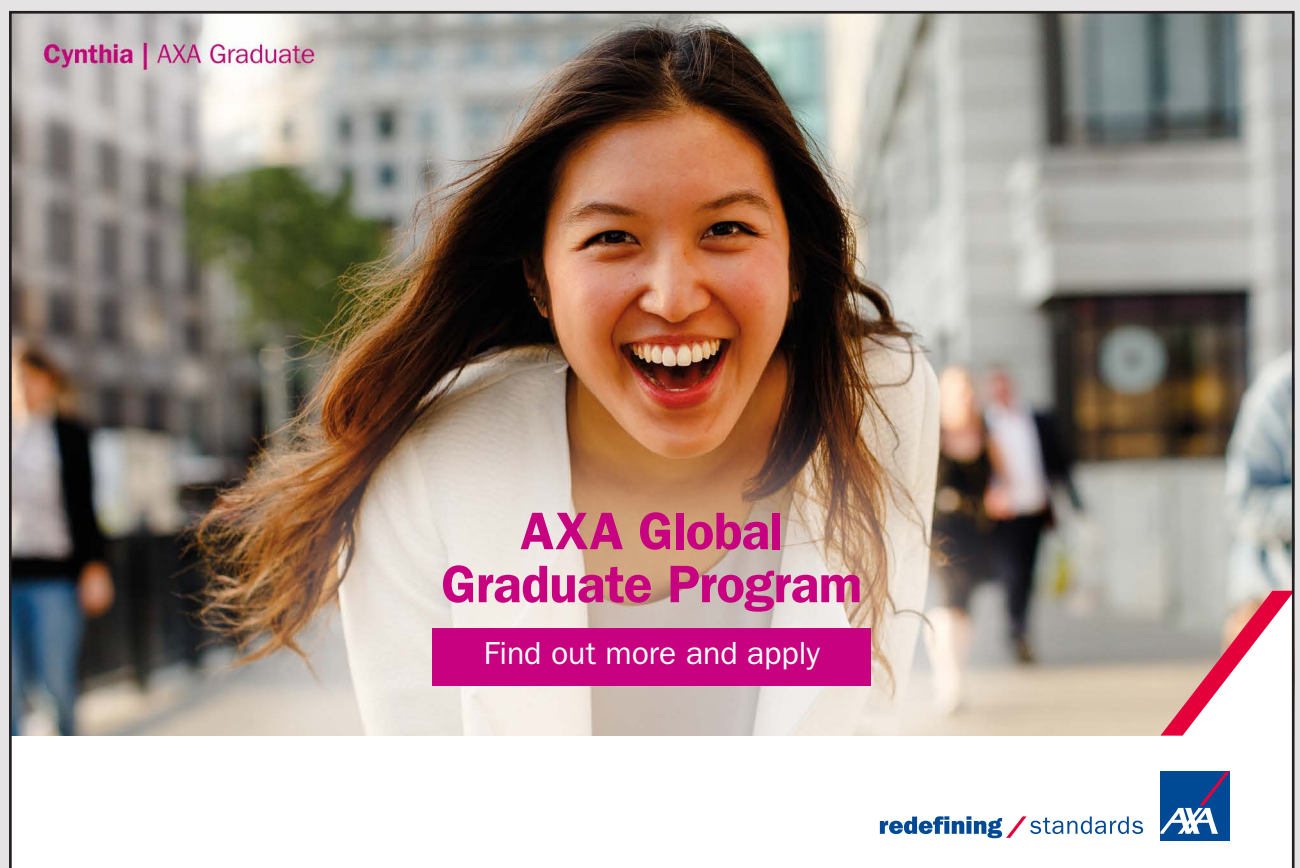
Worldwide, there are special interest groups proposing the ‘integrative model’ of schooling for SEND children and opposing the separation of children and adolescents with SEND by having them assigned to special schools or even special classes within the regular primary and secondary schools.

It is a common practise that in both instances, i.e. integrative and special schooling specially trained personnel, namely teachers in primary/elementary schools, professors in secondary schools, psychologists, social workers, and autism specialists, nurses and other auxiliary personnel are assigned in providing schooling to SEND children and adolescents.

For those of our readers interested in gaining more relevant information, we refer them to a wealth of data available in the relevant European Commission country report for Children with Special Education Needs (website: <http://www.european-agency.org/country-information> – ISBN: 978-87-7110-417-2 in the Electronic edition – (accessed 16 December, 2016).

The countries included in this report, in alphabetical order, are:


Austria, Belgium (Flemish & French speaking), Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Norway, Poland, Portugal, Slovakia, Slovenia, Switzerland, UK (England, Northern Ireland, Scotland, Wales).



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The specialized agency referring to this publication of collected data which, in our opinion, will be of help to readers of our book, (accessed October 12, 2016) states verbatim: (<https://www.european-agency.org/publications/ereports/sne-country-data-2012/sne-country-data-2012>)

“The Agency SNE data collection is a biennial exercise with data provided by the Representatives of the Agency. In all cases this data is from official ministerial sources. All data refers to pupils officially identified as having special educational needs (SEN) as defined in the country in question and all the data presented in this document has been collected in line with each country’s own legal definition of SEN. These definitions are also provided in the texts.

Data provided by countries covers eight agreed questions – five are statistical:

- 1. Number of compulsory school aged pupils (including those with SEN).*
- 2. Number of compulsory school aged pupils who have SEN (in all educational settings).*
- 3. Pupils with SEN in segregated special schools.*
- 4. Pupils with SEN in segregated special classes in mainstream schools.*
- 5. Pupils with SEN in inclusive settings.*

Segregation refers to education where the pupil with special needs follows education in separate special classes or special schools for the largest part – 80% or more – of the school day. This operational definition has been agreed upon by Agency member countries.

The information submitted for questions 1 to 5 is raw data, i.e. actual numbers of pupils registered in different settings.

The three remaining questions provide contextual information with notes and clarifications, particularly referring to legal definitions of special educational needs:

- 6. Compulsory age range with a specification of primary and secondary age phases if appropriate.*
- 7. Clarification of public and private sector education.*
- 8. The legal definition of SEN in the country.*

Data was collected in late 2012, but sources used are from the academic years 2009/2010, 2010/2011 and 2011/2012.”

2 SCHOOLING FOR SEN AND DISABILITIES PUPILS IN SELECTED E.U. STATES AND RUSSIA

At this point we will present briefly raw data for SEND (Special Education Needs and Disabilities) pupils in selected European Union member States and Russia for which we presented schooling data in the previous chapter 4–7 and its sub-sections. Data refer mostly to the 2010–2011 school year.

2.1 In Germany during the academic year 2010–2011 there were 480,024 children with SEN in compulsory education ages with 377,922 enrolled in segregated special schools and 102,102 in fully inclusive settings.

2.2 In the UK (England) in the same year there were 226,210 children with SEN in compulsory education ages with 99,330 enrolled in segregated special schools, 15,490 in segregated special classes in mainstream schools and 111,390 in fully inclusive settings.

In the UK (Northern Ireland) there were 12,891 children with SEN in compulsory education ages with 3,595 were enrolled in segregated special schools, 1,646 in segregated special classes in mainstream schools and 7,650 in fully inclusive settings.

In the UK (Scotland) there were 92,031 children with SEN in compulsory education ages with 6,577 were enrolled in segregated special schools, 3,106 in segregated special classes in mainstream schools and 82,348 in fully inclusive settings.

In the UK (Wales) there were 11,346 children with SEN in compulsory education ages with 3,005 enrolled in segregated special schools, while the rest of the children as there are no specific data available as to those who attend segregated special classes in mainstream schools and in fully inclusive settings were enrolled in either type of school.

2.3 In France there were 330,406 children with SEN in compulsory education ages with 51,994 enrolled in segregated special schools, 194,852 in segregated special classes in mainstream schools and 83,560 in fully inclusive settings.

2.4 In Italy there were 189,563 children with SEN in compulsory education ages with 1,835 enrolled in segregated special schools and 187,728 in fully inclusive settings.

2.5 In Spain there were 106,977 children with SEN in compulsory education ages with 4,910 enrolled in segregated special schools, 2,789 in segregated special classes in mainstream schools and 89,278 in fully inclusive settings.

2.6 In Portugal there were 43,156 children with SEN in compulsory education ages with 1,975 enrolled in segregated special schools, 1,055 in segregated special classes in mainstream schools and 40,126 in fully inclusive settings.

2.7 In Greece there were 36,011 children with SEN in compulsory education ages with 7,861 enrolled in segregated special schools, 26,350 in segregated special classes in mainstream schools and 1,800 in fully inclusive settings.

2.8 In Russia the educational system is so structured as to admit in the primary and secondary schools only those students who can compete on equal basis with their peers and classmates and who can absorb knowledge and progress normally from one grade to the next higher grade.

As this is the prevalent reality pupils with Special Education Needs and Disabilities are practically 'left out' of the education system and, indeed, in economically less developed poor countryside and rural areas they never participate in the education process.

Sustained and systematic efforts are currently being implemented by Russian authorities to adopt the integrative-inclusive system for some SEND types of children and adolescents and place them in the regular school system. Simultaneously efforts are made to improve the special education infrastructure and to fill-up in both regular schools and special schools the vacancies of properly trained special education teachers and specialized support personnel such as psychologists, social workers, speech therapists and autism specialists.

3 SCHOOLING FOR SEN AND DISABILITIES PUPILS IN NORTH AND SOUTH AMERICA

USA and Canada, as we have mentioned previously, comprise almost 80% of the territory of North America which has a total of 23 officially recognized member Nations. In this section we will take a brief look at the schooling systems of USA, Canada and Mexico as well as at the 6 South American countries we used in discussing regular schooling systems. As we have pointed out in the relevant previous chapter we decided to select these countries using the arbitrary but objective and verifiable criterion of having the largest Gross Domestic Product among South American Nations measured in US dollars. The selected six countries are: Brazil, Argentina, Colombia, Venezuela, Chile and Peru.

3.1 In the USA SEND children and adolescents are uniformly covered by the Federal Individuals with Disabilities Education Act (IDEA). The Individuals with Disabilities Education Act (IDEA) was originally introduced and enacted in 1975, and was formerly known as the Education for All Handicapped Children Act (EAHCA).

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In the course of the last four decades since its introduction and enforcement, this Act has been amended by the U.S. Congress several times. The last amendment was voted in 2004 and concerns the following types of disability: Autism, Deaf-blindness, Deafness, Emotional disturbance, Hearing impairment, Intellectual disability, Multiple disabilities, Orthopaedic impairment, Other health impairment (including ADHD), Specific learning disability (including dyslexia, dyscalculia and dysgraphia, among others), Speech or language impairment, Traumatic brain injury, Visual impairment including blindness.

The Act mandates for ALL States the provision of a free and appropriate public school education for eligible students between the ages 3 and 21.

Eligible students are those identified by a team of professionals as having a disability that adversely affects academic performance and as being in need of special education and related services.

According to the U.S. Department of Education, Institute of Education Services, National Centre for Education Statistics in 2013–14 the number of children and youth aged 3 to 21 receiving special education services was 6.5 million, or about 13 percent of all students attending public schools.

Among students receiving special education services, 35% had specific learning disabilities. Specific descriptions of disability types are presented in a relevant table included in the above report. Another relevant table in the same report provides data related to race/ethnicity of SEN pupils.

3.2 In Canada every child with SEN and Disabilities which may be emotional, behavioural, visual, intellectual, language, speech or hearing, has a right to free public education.

By law, all state schools in Canada must have a 'special education' programme. However, this is not possible in all schools as they are not properly equipped to handle SEND children and parents may have to enrol their children in private special needs schools. There are provisions for tuition assistance by the Canadian Federal Government but usually local and provincial funds provide basic assistance.

Most provinces and territories have an Education Act which details their special needs educational policy. School Boards usually provide a programme that integrates children with special needs into mainstream schools along with an individually tailored educational programme.

3.3 In Mexico specific Laws guarantee that all children with SEN and Disabilities will be provided appropriate schooling in primary and secondary levels. Relevant WHO reports, however, indicate that such provisions do not have adequate depth and are not far reaching leaving children and adolescents in economically less developed, poor rural areas uncovered.

Mexico was one of the countries that adopted the *'inclusive education model'* that was making a strong global appearance a couple of decades ago and was promoting the idea of incorporating SEND pupils into the main stream educational systems.

Nowadays the Mexican schooling system for SEND pupils incorporates two specific models, namely the Regular Education Support Services Unit *'Unidades de Servicios de Apoyo a la Educación Regular'*, or USAER and the Multiple Attention Centres *'Centros de Atención Múltiple'* or CAM.

USAERs as specialist support teams usually consist of a social worker, a psychologist, a speech and language therapist, and a special education teacher. These teams serve four or five schools in the same school/geographical district, spending one day per week in each school.

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On the other hand, CAMs are alternative settings or special schools, designed to provide education to students from preschool through to high school if they are unable to integrate successfully into regular classrooms and need special additional accommodations. The Centres are organized by group and age and work to provide instruction to students with diverse disabilities who belong to the same group. Each Centre maintains autonomy in organizing, planning and instructing their students.

3.4 In Brazil the Federal Constitution does recognize the rights of children and adolescents with SEN and Disabilities to receive special education suggesting, simultaneously, that this should take place within the regular school systems to which SEND students should be integrated.

The National Ministry of Education controls and supervises the services to special needs persons recognizing six categories of special educational needs: emotional and behavioural disturbance, mental retardation/severe learning difficulties, physical/motor disabilities, visual impairment, hearing impairment and multiple disabilities. While the services to SEND students are under the jurisdiction and control of the Ministry of Education, the Ministry of Health in special cases and for special reasons has some control and involvement in services provided to persons with physical disabilities.

SEND pupils are provided with supportive teaching in regular classes, receive services in resource rooms and special classes in regular schools, or they are assigned to attend day special schools while some pupils are committed to boarding schools.

The reality is that constitutional prescriptions are somewhat met at large urban centres but are seriously lagging in Brazilian rural areas. Additionally, large scale lack of properly trained teachers and care professionals worsen the existing poor conditions of services provided to SEND students.

3.5 In Argentina the National Ministry of Education recognizes and supports the right of every child with SEN and Disabilities to receive primary and secondary education preferably within the existing regular schooling system.

Although the Argentinian approach for providing services to SEND pupils focuses on the integrative model which, as we have already made clear above, aims to place these pupils in the same regular schooling classrooms as other children there are also over a thousand special education schools which cater to the needs of SEND students.

3.6 In Colombia the National Ministry of Education recognizes the rights of children with SEND and has adopted the integrative model. Since the Colombian approach to providing services to SEND pupils is of the integrative type these pupils are enrolled in the regular schooling system of primary and secondary level and are provided some additional support help by specialist teams. Only recently some special education schools are being slowly introduced in the country's education system.

3.7 In Venezuela the National Ministry of Education has adapted the integrative model and all efforts aim to enrol SEND pupils into the regular primary and secondary school system.

Six categories of disabilities have been identified and used in placing students in special education: mental retardation/severe learning difficulties; physical/motor disabilities; visual impairment; hearing impairment; language disorders; and learning disabilities.

Special Needs and Disabilities students are under the jurisdiction of the National Ministry of Education but pupils with emotional or behavioural disturbances come under the auspices of the National Ministry of Health as well.

SEND students are provided with additional services and support from specialized teaching staff when they attend regular classes, in resource rooms, in special classes in regular schools, while some are enrolled in day special schools or boarding special schools.

Classroom assistance is additionally provided by volunteers and staff from departments of psychology and special education of various universities. Further additional support comes from members of pedagogical teams comprising the school unit of teachers in special education, psychology, social work and speech therapy. Furthermore the so-called integrative model is supported by specialist integration teams.

3.8 In Chile the National Law for Social Integration of Disabled Persons provides that all disabled persons be integrated in the general education system; it also provides that any necessary modifications to the curriculum may and should be implemented for the benefit of disabled persons.

In Chile's integrative model the Central Government finances all educational activities while local education departments oversee and implement special support to SEND students attending regular schools, special classroom assistance, services in resource rooms and assistance by visiting specialists. In addition when so determined and judged by relevant authorities some SEND children and adolescents are sent to special schools and to boarding special schools.

Seven categories of special educational needs have been defined: mental retardation/severe learning difficulties; physical/motor disabilities; visual impairment; hearing impairment; language disorders; learning disabilities; and severe difficulties in communication and relationships.

3.9 In Peru the National General Law of Education has a specific chapter regulating the provision of education and training to children and adolescents with Special Education Needs and Disabilities.

There is a policy encouraging the integrative model but few regular schools have adopted it. Special Education Needs and Disabilities students can attend special classes in regular schools, they can attend special education day schools and, depending on the severity of their disabilities, they may enrol in boarding special schools.

The Law defines seven categories of special educational needs: emotional and behavioural disturbance, mental retardation/severe learning difficulties, physical/motor disabilities, visual impairment, hearing impairment, language disorders and language disabilities.



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4 SCHOOLING FOR SEN AND DISABILITIES PUPILS IN SELECTED AFRICAN COUNTRIES

We have mentioned previously that the total number of independent Nations in the African continent is currently over 50. Egypt, as we noted, presents the geographic peculiarity that it has its main geographic entity in Africa but has also a small territory located in the Asian continent.

As we have done previously with Europe and the Americas we will make brief mention of the schooling systems of the top 10 Nations of the African continent selected on the basis of the volume of their GDP. At this point we should mention the fact that in some Nations GDP may fluctuate as their economies and national currency may undergo devaluations but in general the top 10 economies in Africa are the following: Nigeria, Egypt, South Africa, Algeria, Morocco, Angola, Sudan, Kenya, Ethiopia and Tunisia.

4.1 In Nigeria the relevant National Policy on Education (2004) defined Special Needs Education (SNE) as the Education of children and adolescents who have learning difficulties because of the different kinds of handicaps: blindness, partial – sightedness, deafness, hardness of hearing, mental retardation, social maladjustment, limb deformation or malformation, due to circumstances of birth, inheritance, social position, mental and physical health patterns, or accident later in life.

As a result of their condition such children and adolescents are unable to cope with the regular school class operation, organization and methods. Special needs education in the above definition is a formal, special educational training given to the persons (children and adolescents) with SEND.

Poverty, lack of facilities and properly trained personnel, ignorance of parents of SEND children are major barriers in the enrolment of these children and adolescents into main stream schooling system and in creating and funding of special education schools as needed.

4.2 In Egypt special education is primarily under the domain of the National Ministry of Education but for some categories of students with severe learning difficulties both the Ministry of Health and the Ministry of Social Welfare get involved and provide together their specialist services and support.

The general regulations applying to all children and adolescents entitled to free primary and secondary education are considered to apply to SEND pupils except in those cases where it is deemed that the child cannot make proper progress or benefit from participation in the schooling system.

The Egyptian authorities recognize six categories of special education needs: mental retardation/severe learning difficulties; visual impairment; hearing impairment; language disorders; learning disabilities; and those requiring education in hospital classes.

Integration in the regular school system is encouraged in Egypt and additionally SEND pupils receive support by visiting specialists in resource rooms and special classes when they are enrolled in regular schools; alternatively they may attend day special schools and special boarding schools.

4.3 In South Africa, a nation which has experienced its notorious apartheid system of Government from 1948 to 1994, after the abolishment of apartheid and the formation in 1994 of the Nelson Mandela Government serious efforts have been made in rectifying acts of commission and omission in providing schooling for all its children irrespective of race and, to some extent, children and adolescents facing SEN and Disabilities.

South Africa a country where 11 languages are spoken and where there are dramatic limitations in the numbers of properly trained teachers, the efforts of the Ministry of Education in providing improved quality of primary and secondary education to all children, irrespective of race or ethnicity, have intensified in the last three decades.

Under the current educational legislation which is supervised and regulated by the National Department of Basic education all children are guaranteed proper primary and secondary schooling without exclusions of any type including that of SEND but this is materializing rather slowly.

4.4 In Algeria the coordination, supervision and provision of special education to SEND pupils is mainly under the auspices of the Ministry of Education in cooperation with the Ministry of Social Affairs and, as relevant needs may arise, the Ministry of Health may step in.

The general rules and regulations concerning the primary and secondary schooling of all children and adolescents are considered to apply also to SEND pupils. Algeria has adopted the policy encouraging integration of SEND children and adolescents in the regular schools.

The Algerian authorities define six special education needs and disabilities categories: mental retardation/severe learning difficulties; physical/motor disabilities; visual impairment; hearing impairment; language disorders; and learning disabilities.

4.5 In Morocco the schooling system is supervised and regulated by the National Ministry of Education and the implementation of curricula and programs is relegated to the 16 Regional Administrative Units which oversee the country's 72 provinces.

Primary and secondary education lacks proper infrastructure and properly trained teachers and specialized support staff and the provision of schooling to pupils with SEND is at a very low level.

4.6 In Angola, a country that has seen much destruction and catastrophes from continuous civil strives and wars, the educational system is of a poor quality and, as mentioned previously in the relevant presentation of the regular school system, in a county where compulsory schooling covers only 4 years of primary education provision for education services to SEND pupils is almost non-existent.



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4.7 In Sudan the official language of instruction is Arabic. A large segment of the country's infrastructure of buildings and premises of primary and secondary schools has been destroyed by years of civil strife and war.

National efforts to rebuild schools and to provide properly trained teachers and other specialized staff have been hampered and so there is not much but a rudimentary system of providing schooling for SEND children and young adolescents. The Nation's Capital city, Khartoum, fares much better than the devastated country side in providing schooling services for all children.

4.8 In Kenya the regulations covering primary and secondary schooling are deemed to apply also to children and adolescents with Special Education Needs and Disabilities and such students are not excluded from the education system because of their SEND. The reality, however, is that many SEND children and adolescents are left out of the schooling system due to lack of educational facilities.

The integrative policy is encouraged and applied and when enrolled in the regular school system SEND students can be assisted by supportive teaching in regular classes, in resource rooms, in special classes in regular schools; alternatively they attend day special schools and boarding special schools.

4.9 In Ethiopia special education is the responsibility of the National Ministry of Education and the integrative model in the regular primary and secondary schooling system is encouraged. The SEN and Disabilities students are assisted by supportive teaching in regular classes, by attending special classes in regular schools or, alternatively, they enrol in day special schools or boarding special schools.

4.10 In Tunisia serious efforts have been undertaken to improve the regular schooling system on both the primary and secondary levels. Within these efforts specific actions have taken place to help integrate SEN and Disabilities children and adolescents into the mainstream schools but the end results continue to be disappointing.

Part of the problem stems from the poor national infrastructure in education and part from the lack of properly trained special education teachers and support staff, such as psychologists, social workers, speech therapists and others whose presence is necessary in special schools.

5 SCHOOLING FOR SEND PUPILS IN SELECTED ASIAN COUNTRIES, AUSTRALIA & NEW ZEALAND

Asia happens to be the world's largest continent and, as mentioned previously, it is made up by 48 independent Nations while the smaller continent in the world is Australia and Oceania where there are 14 Nations the largest of which are Australia and New Zealand.

As we did in presenting school systems in Europe, the Americas and Africa we have chosen for presentation below the same countries in Asia and Australia-Oceania based on their size of GDP.

For the Asian continent the countries are: China, India, Japan, Indonesia, South Korea, Saudi Arabia, Turkey, Iran, Thailand, Taiwan and Pakistan and for Australia-Oceania the countries are Australia and New Zealand.

5.1 In China special education is dealt with mainly with the integrative – inclusion orientation where pupils with Special Education Needs and Disabilities are absorbed into the regular school systems and some specialist support and teaching is provided in schools where trained personnel is available.

Six categories of special educational needs have been defined: mental retardation/severe learning difficulties; physical/motor disabilities; visual impairment; hearing impairment; language disorders; and multiple disabilities.

Although the State Educational Commission is responsible for services provided to SEND students some services are also provided by the Ministry of Health and the Ministry of Social Welfare.

The State, as indicated above, encourages the integrative model and in some school systems special services are provided to SEND pupils by support teaching in regular classes, in resource rooms and in special classes in regular schools; alternatively children and adolescents are assigned to day special needs schools and to boarding special needs schools.

In the vast Chinese countryside the lack of special needs schools and of specialized personnel, such as special education teachers, psychologists and social workers combined with pervasive poverty do not guarantee provision of all necessary services to all children and adolescents needing them but Central Government efforts continue towards improving infrastructure conditions and staff training.

5.2 In India the Disability Act of 1995 provides that children with disabilities have the right to education until the age of 18. Children with physical, behavioural, emotional, cognitive-intellectual disabilities, after special examinations by specialist boards, can acquire a relevant certificate from any Governmental Hospital and so be entitled to enrol either in mainstream education (and be provided with specialist teaching and support) or seek admission to one of India's more than 2,500 special education schools which are financed by the Government or by NGO's.

5.3 In Japan the education for children and adolescents with SEN and Disabilities aims at forming an integrative-inclusive education system which enables children and adolescents with and without SEND to study together.

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The underlying philosophy and aim is to develop respect for the differences in people and maximize the mental and physical abilities of children regardless of the presence or absence of SEND which should make possible a society in which every person can effectively participate.

Japan is currently promoting a shift in the education system for students with disabilities from the world wide familiar term of '*special education*' where pupils are instructed by regular and specialist teachers according to the type and degree of their disability to a '*Special Needs Education*' system where the educational needs of each student with SEN and Disabilities are ascertained and appropriate educational support is provided.

This shift of focus includes pupils with Learning Disability (LD), Attention Deficit Hyperactivity Disorder (ADHD) and High Function Autism (HFA). Surely a proper framework for promoting and implementing this shift is needed and it is being methodically created and implemented.

5.4 In Indonesia a pertinent National Law (Law 20, 2003) foresees that every citizen with physical, emotional, mental, intellectual, and/or social disability shall have the right to special education and, furthermore, citizens in remote areas shall be provided with special education services.

Indonesia recognizes seven categories of SEN and Disabilities: emotional and behavioural disturbance; mental retardation/severe learning difficulties; physical/motor disabilities; visual impairment; hearing impairment; language disorders; and multiply handicapped.

The Indonesian national model encourages integrative education and SEN and Disabilities pupils and special school responsibilities are shared between the Ministry of Education and the Ministry of Social Welfare. Support takes the form of special teaching in regular classes and special classes in regular schools, or the assignment of pupils to day special schools and boarding special schools.

5.5 In South Korea the Ministry of Education, Science and Technology provides free education to children with physical and intellectual disabilities from ages 5 to 18. Special national laws mandate that South Korean schools may not refuse admission or discriminate against pupils with learning disabilities or special needs.

Each province is required to have one school that caters to SEN and Disabilities pupils although in reality many such students, within the philosophy of integrative-inclusive schooling, are enrolled in the regular school system.

5.6 In Saudi Arabia three categories of special educational needs have been defined: mental retardation/severe learning difficulties, visual impairment and hearing impairment. SEN and Disabilities individuals are under the jurisdiction of the Ministry of Education.

The country has no policy encouraging integration of SEND students to regular schools and as the 1995 UNESCO report has specified, children with multiple handicaps, severe physical disabilities and severe learning difficulties are excluded from the regular public education system.

SEND pupils receive support teaching in regular classes, in special classes in regular schools or, alternatively, they are assigned to day special schools and to boarding special schools.

5.7 In Turkey a country which has adapted the UN Resolution of the Rights of Persons with Disabilities in 2009, the fundamental policy was and continues to be that of the integrative – inclusive model. In this respect children and adolescents with SEN and Disabilities are encouraged and helped to interact with other children as much as possible so as to facilitate their integration in society.

SEN and Disabilities pupils with visual, hearing or physical impairment as well as children with behavioural, social or learning difficulties attend regular school classes or, alternatively they may enrol in special schools which operate under the auspices of the National Ministry of Education.

Children with SEN and Disabilities undergo special evaluation of their physical, mental, emotional and behavioural condition in designated State controlled and operated centres and are provided with a relevant diagnostic certificate. Parents are provided with guidance and proper advice, when needed, in seeking a special school for their children.

In Turkey SEND pupils can receive education in regular schools, attending special classes in mainstream schools or, alternatively, enrol in special schools. The State provides specially trained teaching staff as well as teams of support specialists comprised by psychologists, social workers and speech therapists.

5.8 In Iran the approach to providing education to SEN and Disabilities children and adolescents follows the integrative model based on the social philosophy that inclusion is not a privilege granted to these children but a mandate of a 'truly humane' society.

SEND students enrol in mainstream schools either in the regular classes or in special classes within the regular school system. In this inclusive model SEN and Disabilities pupils receive support in teaching as well as other services by trained teaching and health services staff. If special conditions make it necessary SEND children and adolescents enrol in special education schools.

As the country experienced a robust growth in population a corollary effect was that there was also a rise in the numbers of children needing special education and so efforts were made to increase special needs schools but these efforts have not yet reached the desired levels.

Children are classified as worthy of special education if they are visually handicapped, hard of hearing or deaf, deaf and blind, facing learning difficulties, educationally mentally retarded, emotionally disturbed or have multiple handicaps. The diagnosis is made at special Government controlled centres.

5.9 In Thailand special education is overseen and coordinated by the National Ministry of Education and the general education regulations also apply to all SEND children and adolescents.

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Children and adolescents with severe disabilities, such as deafness or blindness and multiple handicaps are excluded from the country's public education system.

The national model focuses on the integrative type and SEND children and adolescents are supported with special teaching in regular classes, in resources rooms, in special classes in regular schools, or alternatively they are assigned to day special schools and to boarding special schools.

5.10 In Taiwan the National Special Education Act was amended in 2013 incorporating suggestions for integrative – inclusive education made by the United Nations Educational Scientific and Cultural Organization (UNESCO) in order, on the one hand to enhance and upgrade special education for SEN and Disabilities students and on the other hand to support and facilitate gifted students.

The national model is that of integrative – inclusive education enrolling SEND children and adolescents to regular schools so that they can be part of their community by enrolling in and attending classes with their neighbourhood peers.

As of 2012, it is reported that 93.37% of preschool disabled students in Taiwan are attending regular public schools, while the more analytic figures are 87.19% for elementary schools, 84.44% for junior high schools and 73.06% for senior high schools.

5.11 In Pakistan, as is the case in some other developing countries, schooling for SEN and Disabilities children and adolescents is not yet judged as being adequate despite a series of Governmental plans which have been implemented in the last three decades. Lack of financial resources needed for the creation of the educational physical infrastructure and for improving the human resources by training adequate numbers of special personnel are two major obstacles.

Back in the '80s the Directorate General of Special Education and the National Trust for the Disabled were created at the federal level and ever since they are cooperating with provincial governments in providing schooling for SEND children and adolescents.

Five categories of special needs education are identified by Pakistan's Government and they are: mental disability, visual impairment, hearing impairment, physical disability, multiple disability.

It should be noted in closing that precise data on the number of special schools existing in the country are scarce and so are the relevant data on SEND children and adolescents.

5.12 In Australia as SEND children and adolescents are considered to be those persons who have been diagnosed with one of the following eight conditions: intellectual disability, physical disability, vision impairment, hearing impairment, language disorder, mental health problems, and autism.

The Australian education system has adapted the integrative – inclusive approach which means that most of special education is provided in mainstream schools where, as needed, children and adolescents are provided with specialist support services.

Looking at this reality more carefully it should be noted that in most cases SEND children and adolescents in the 6 States and 10 territories of Australia receive their education in regular classrooms with a modified curriculum or additional teaching support, in special small classes within a regular school or by placement in a special day school or special boarding school when their disabilities require intensive support.

5.13 In New Zealand Special education is available for children and adolescents with physical and/or intellectual impairments; hearing or vision difficulties; for children who struggle with learning, communicating, or getting along with others; or who have emotional and/or behavioural difficulties.

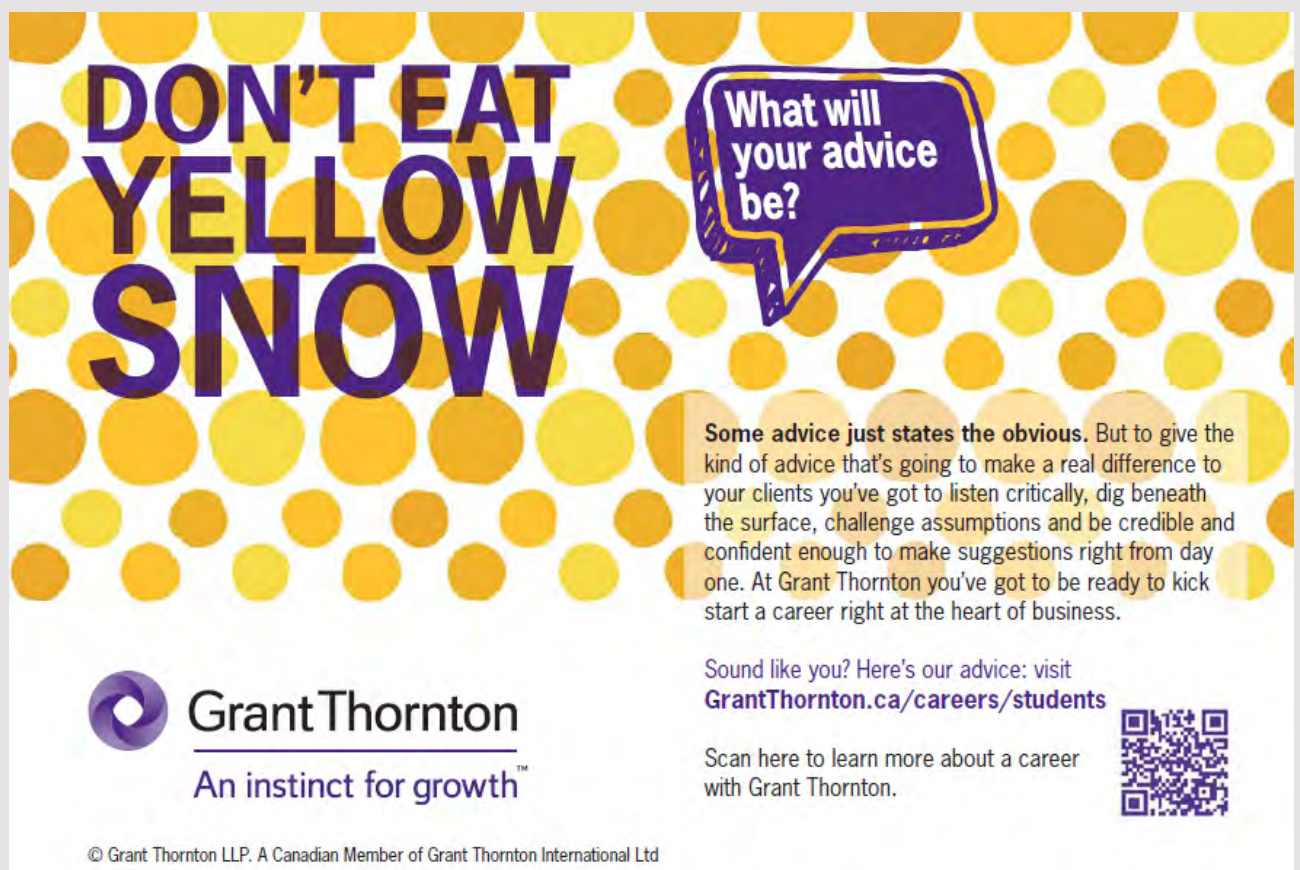
Whenever possible, and if it is their parents' preference, children and adolescents with physical or other impairments are enrolled with other children and adolescents in regular school classes and they receive additional specialist training and support as needed. For children and adolescents with more serious problems which hinder their participation in the regular schooling system there are special day care or residential schools staffed by specialists which provide more intense training and support.

**PART FIVE – 20TH CENTURY
RESEARCH ON LEADERS
AND LEADERSHIP**

1 FROM ATHENS OF THE 5TH CENTURY B.C. TO THE USA OF THE 20TH CENTURY A.D.

Leaders and the exercise of leadership in human groups is a subject that was most dear at first to philosophers and political scientists and ultimately in our times to sociologists, psychologists and management theorists.

The first and most widely known classic utopian 'city-state' Plato's 'Republic', (in Greek, 'Πολιτεία'), was referred to by Socrates as the utopian 'Kallipolis' from the Greek word meaning 'beautiful city', emerging from a combination of the words 'κάλλος' (kallos) meaning 'beauty' and 'πόλις' (polis) meaning 'city'.




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In ‘The Republic’ Plato, through words uttered by Socrates, states that the Administrators Leaders of the utopian ‘city-state’ referred to as the ‘Guardians’, should be selected from those students who successfully and with distinction complete a systematic, rigorous, demanding and ardent education.

For Plato the ‘Guardians’ of the ‘Republic’ the city-state’s administrators – leaders should be well trained and chosen from the best available human resources which signified Plato’s thesis that leaders are not born having through heredity the innate capacity to lead but could and should be trained to be leaders through proper education.

Aristotle, on his part, emphasized that leaders should acquire ‘sophrosyne’ (in Greek the term ‘σωφροσύνη’ means temperance, prudence, or even a harmonious state of self-control) as he stated in his ‘Nicomachean Ethics’ (in Greek ‘Ἠθικά Νικομάχεια’). Aristotle’s emphasis on leaders and leadership focused on the process of acquiring knowledge and experiences in an empirical fashion and not merely by intellectual postulation (a process most dear to his teacher Plato).

For the last 25 centuries namely from the 5th century B.C., which has come to be known as the “*golden age of Athens and of Pericles*” to the 20th century A.D., leaders were considered to be individuals born with inherited characteristics of personality and character among which the most important were ‘*charisma, appearance, confidence and intelligence*’.

In these *trait theory* of leadership as R.M. Stogdill states in his writings, the aims and efforts were concentrated on discovering, defining, appraising and discussing the specific traits that differentiate leaders from other human beings.

2 A BRIEF GLIMPSE OF RESEARCH EFFORTS AT THE UNIVERSITIES OF IOWA, OHIO AND MICHIGAN

A significant shift from *'trait theories'* occurred when researchers and theorists started looking at the *'behaviour'* of leaders toward those they were leading. The *'behaviour'* types of leadership theory, also known as the *'style of leadership'* approach, were exemplified in the new type of research efforts conducted by Kurt Lewin, Ronald Lippitt and Ralph White at the University of Iowa shortly before the eruption of the Second World War.

Using as a research platform and frame of reference the three well known, classic types of leadership, namely, the *'authoritarian'* type, the *'democratic'* type and the *'laissez-faire'* type in the Iowa University studies the researchers made specific selections of the person who they, subsequently, placed in the leadership role in charge of small groups of children.



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In these experiments, as the '*authoritarian-autocratic*' style dictates the leader would coerce the members of his team toward desired behaviours and control rewards; acting in a '*democratic/laissez faire*' style the leader would encourage participation and decision making and would delegate authority to selected members of the group.

The most effective style of leadership, as the results pointed out, was the '*authoritarian-autocratic*' type, when the leader was physically present, but the children seemed to resent this style and did not perform as well during the leader's absence. The results relating '*effectiveness to authoritarianism*', however, were not convincing as the children, where the leader performed in a '*democratic/laissez faire*' style, behaved as well as children of '*authoritarian*' leaders when their leader was physically present and did so even during their leader's absence.

Realizing that the Iowa University research efforts which involved children did not turn out to be as fruitful as originally thought, researchers at Ohio University used as subjects a broad spectrum of managers and employees from a variety of private enterprises as well as Government organizations.

Using a very lengthy questionnaire which was repeatedly modified and was shortened from the original 1,800 items to 180 and ultimately fewer the LBDQ (*Leader Behaviour Description Questionnaire*) was administered to a large number of educational, military and industrial personnel brought forth two distinct leader behaviour types, namely those '*initiating structure*' and those '*initiating consideration*'.

The structure characteristic related to production matters focuses on task oriented issues while the consideration element related to employees focuses on human relations matters. These research efforts pointed out that administrators as managers and leaders provide for their subordinates the most appropriate structure while, simultaneously, they nurture them so that pre-set and desired results may be obtained.

At the University of Michigan the research efforts, as Likert has noted, helped in identifying a pair of leadership types of behaviour characterized as '*employee orientation*' and '*production orientation*'.

Managers as leaders with a strong commitment to human relations and employee satisfaction, who see their employees as human beings while respecting their individuality and uniqueness, are obviously motivated by the *employee orientation* element. Compared to the Ohio University types of leaders these persons do identify with the *consideration* type of behaviour.

On the other side, *production orientation* specifies the type of leaders who give major emphasis to reaching production goals since they view the people they supervise as the necessary means for getting their job done. It should be easily understood that this type of leadership behaviour resembles the *initiating* structure type which had already been identified by researchers in the Ohio University research studies.

In the Michigan University research studies the researchers were initially lead to believe that the two types which emerged from their efforts, namely *employee orientation* and *production orientation*, stand at the opposite ends of a continuum. Further research studies lead them to revise their initial conception accepting the fact that the two types were independent of each other and leaders could show interest to both production and employees.



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3 TANNENBAUM AND SCHMIDT'S 7 STAGE 'LEADERSHIP PATTERN' CONTINUUM

In their article published in the Harvard Business Review with the title '*How to choose a Leadership pattern*' (1958) Tannenbaum and Schmidt gave a new perspective to the classic antithesis oscillating between the *authoritarian* manager-leader who dictates to his subordinates what must be done and expects them to do it and the *democratic* manager-leader who fully engages them in the decision making process and its implementation.

Tannenbaum and Schmidt outlined a 7 stages continuum between the authoritarian and the democratic/laissez-faire leadership types.

Starting at the authoritarian end, at the first stage the manager-leader takes his or her decisions and announces them to the subordinates and expects unquestionable compliance.

At the second stage of the continuum the manager-leader takes his or her decisions and then proceeds to explain them to the subordinates expecting to gain their acceptance through bargaining and persuasion.

At the third stage the manager-leader having taken the decisions proceeds to present them to the subordinates giving ample explanations of the rationale behind them and opens a dialogue inviting subordinate participation by posing questions.

At stage four the manager-leader states his or her provisional decisions and starting a dialogue with the subordinates invites their input which depending on its usefulness and practicality will be incorporated in the manager-leader's final decision.

At stage five the manager-leader presents to the subordinates the problems or challenges at hand, invites open and earnest contributions to possible ways for handling the situations and then reaches a decision incorporating the best ideas presented by subordinates.


At stage six the manager-leader presents his or her '*outline of limitations*' in the decisions to be taken, stays at the side-line and listens as the subordinates offer ideas, views and solutions and in essence crystallize the decision to be made and put into effect. Surely this stage appears as a case where the manager-leader abdicates his or her responsibilities and the game is left in the hands of the subordinates with possible negative effects but as the manager-leader has presented the 'limitations' no catastrophic events can occur.

Finally, at stage seven the problems are identified by the subordinates and after discussion of potential proper solutions the decision is taken by them and binds the manager-leader. The potential dangers of such a process are there but in this extreme sample of democratic-laissez-faire decision making process the manager-leader has full knowledge and appreciation of his or her subordinates talents, expertise, knowledge and commitment so that potential dangers can be drastically minimized. This type of decision making is the most motivational type for full engagement of subordinates to organizational integration.

4 THE APPEARANCE OF 'CONTINGENCY' AND 'SITUATIONAL LEADERSHIP' THEORIES

The '*contingency*' type theories are founded on the thesis that manager-leader effectiveness depends on how well he or she fits the context in which they must act. Among the various '*contingency*' theories the one developed and presented by Fiedler (1967) differs from most others as it is one of the earliest presented and also the most cited theory.

Fiedler and his collaborators studied a large number of subjects from military organizations and the careful scrutiny of their behaviour permitted Fiedler and his group of researchers to lay down some useful and indeed empirically assessed generalizations on styles and contexts.



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Contingency theory takes into consideration both the leader – manager style and the situation and Fiedler has proposed that each situation can be characterized by three specific elements, namely, '*leader-member relations*' which sometimes is labelled as '*group atmosphere*', '*task structure*' and '*position power*'.

The first element, labelled '*group atmosphere*', contains emotional – human relations characteristics such as followers trust, respect, confidence and loyalty to the manager-leader. It should be easily understood that if the relations between leader-manager and the group of subordinates are positive, the '*group atmosphere*' can be labelled as '*good*', while when friction exists and the feelings are negative, the 'leader-members' element is labelled as '*bad*'.

The second element, '*task structure*', refers to the degree to which the requirements for fulfilling successfully a task are clear, well spelled-out and understood.

The third element, the '*position power*' refers to the authority bestowed to the manager-leader by the enterprise or the organization to hire and fire, to give pay-raises or elevate employees to higher positions, in other words to possess the authority needed to reward or punish.

Hersey and Blanchard (1969) in their '*situational leadership*' theory focused on the situation and in essence stated that effective managers-leaders are those that can adapt their personal-individual style to the varying demands presented by various situations.

The manager-leader's choice of style depends on three distinct factors, namely, the personality and '*modus operandi*' of the leader, the characteristics, personalities, motivation and possession of skills and dexterities of the subordinates and the situation in which the manager-leader and followers are called to act.

For Hersey and Blanchard, the '*readiness*' of the subordinates and the specific nature of the '*situation*' in which the manager-leader has to act projecting a '*style of behaviour*', define a variety of possible choices.

Thus, when subordinates do not possess the skills demanded for the accomplishment of a task or series of tasks and their readiness is low, '*structuring*' and '*coaching*' may be appropriate. On the contrary, when the subordinates are in a state of elevated readiness and, simultaneously, possess the needed skills and dexterities for the accomplishment of the task or series of tasks, then the styles of '*encouragement*' and '*delegation*' may be more appropriate.

Four distinct types of style were presented by Hershey and Blanchard in their theory noting that the manager-leader can choose to '*dictate*' or to '*coach*', to '*support*' or to '*delegate*'.

Introducing his so called '*path-goal*' theory House (1971) has combined three elements, namely, leader – manager style, characteristics of subordinates and the work setting constituting a heuristic phase of the expectancy theory of motivation. House and other researchers have suggested that the leaders – managers who operate following the premises of '*path-goal theory*' can adopt one of four specific behaviour styles and act in accordance with it:

In the '*directive or instrumental style*' of leadership the leader – manager sets and announces to subordinates clearly the expected standards of performance and the appropriate rules and regulations to be followed.

In the '*supportive leadership style*' the leader – manager shows care for the subordinates and their human needs.

In the '*participative leadership style*' the leader – manager consults with the subordinates, listens to their suggestions and integrates them in the final decisions to be taken and implemented.

In the '*achievement oriented leadership style*' the leader – manager shows high degrees of trust and confidence in the subordinates' capabilities and sets high goals for group performance.

5 'TRANSACTIONAL' AND 'TRANSFORMATIONAL' LEADERSHIP THEORIES

A landmark contribution was made by Burns (1978) in his book on 'Leadership' in which he introduced by definition and differentiation two fundamental forms of leadership, namely, '*transactional leadership*' and '*transformational leadership*'.

It is a historical given in scholarly bibliography that prior to Burns, the idea of a '*social exchange theory*' was proposed by Homans (1950, 1974) who suggested that '*social interaction*' constitutes a form of exchange in which group members contribute to the group at a cost to themselves and, in return, they receive benefits from the group at a cost to the group.

In the leadership theory proposed by Burns there is a continuum consisting of a '*leadership act*' where leader and follower initiate an exchange with each other which is short-termed and non-binding, in contrast to the '*transforming leadership*' point where the interaction raises both leader and follower to higher morale levels recognizing the follower as an important player.

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'*Transactional leadership*' presupposes an exchange process of mutual dependence founded in the authority structure of an enterprise or organization; it can be stated in simple terms as the proposition '*if you do this, I will give you that*'. This type of leadership appeals to the follower's self-interest and the leader's clarification of work tasks and expectations, and corresponding rewards or punishments.

In contrast to the above type of leadership, '*transformational leadership*' presupposes the leader's capability in creating vision and arousing followers' values and their commitment to the goals of the enterprise or the organization.

Operating on a platform of trust, ensuring justice and raising the sense of loyalty, this type of leadership can transform and greatly enhance the performance of an enterprise or organization providing it with a much needed advantage in the struggle for survival and excellence in our highly competitive world.

'*Transformational leadership*' shows the significance of human relations qualities in the crucial role of the leader – follower transactional relationship and highlights the bond emerging between them as a result of trust and elevated dedication to goal achievement for private and public enterprises and organizations.

These human relations characteristics, as Bass (1985), Bass and Avolio (1994), Kreitner and Kinicki (1995) have noted, bring forth the idea that the transformational leadership theories, denoting inspirational leadership, are very closely related to the concept of '*charisma*' and the '*charismatic leader*'.

Indeed leaders can inspire followers and gain their full respect and dedication to goal fulfilment for the private and public enterprises and organizations they manage when the followers perceive them as possessing that special characteristic known throughout the ages as '*charisma*'.

Bass has formulated one of the most prominent concepts within the transformational approach. In his more recently published work, Bass (2008) sees transformational leadership as moving followers beyond their self-interests, as well as, elevating the followers' concerns for achievement and the well-being of others or the organization.

Judge and Piccolo (2004) have noted that a substantial body of research has accumulated on the theory of '*transformational-transactional leadership*'. Looking at the spreading of the theory as well as at the research activity, in comparison to other leadership approaches, it seems as if this theory has replaced earlier leadership approaches such as the described trait, behavioural or situational approaches.

The four dimensions of transformational leadership are:

'*Charisma or idealized influence*' where charisma, or idealized influence, is the degree to which the leader behaves in admirable ways that cause followers to identify with the leader. Charismatic leaders display conviction, take stands, and appeal to followers on an emotional level.

'*Inspirational motivation*' refers to the degree to which the leader articulates a vision that is appealing and inspiring to followers. Leaders with inspirational motivation challenge followers with high standards, communicate optimism about future goal attainment, and provide meaning for the task at hand.

'*Intellectual stimulation*', is the degree to which the leader challenges assumptions, takes risks, and solicits followers' ideas. Leaders with this trait stimulate and encourage creativity in their followers.

'*Individualized consideration*' refers to the degree to which the leader attends to each follower's needs, acts as a mentor or coach to the follower, and listens to the follower's 'concerns and needs.'

Bass and Avolio, in their work mentioned above, have suggested that transformational leadership is seen when leaders succeed in stimulating interest among colleagues and followers to view their work from new perspectives, in generating awareness of the mission or vision of the team and the organization, in motivating people to look beyond their own interest and toward acts that will benefit the group.

'*Transformational*' type managers-leaders motivate others to do more than they originally intended and often even more than they thought possible. Transformational leadership is an expansion of transactional leadership. Transactional leadership emphasizes the transaction or exchange that takes place among leaders, colleagues and followers. This exchange is based on the leader discussing with others what is required and specifying the conditions and rewards they will receive if they fulfil these requirements.

Viewing it from this perspective it would appear that transformational leaders and transformational leadership do relate positively with charismatic leaders and charismatic leadership.

6 THE THEORY OF 'EMOTIONAL INTELLIGENCE' COMES ON STAGE

In the last three decades both academic research and popularized literature have witnessed the presentation and elaboration of the theory of '*Emotional Intelligence*'. Daniel Goleman popularized the '*E.I. Theory*' which, in very broad terms, refers to the ability to understand and manage both your own emotions and those of the people around you.

There are four elements involved in encapsulating E.I., namely, *self-awareness* (self-confidence), *self-management* (self-control), *social awareness* (empathy) and *social skills* (influence).

Goleman (1998) relating E.I. Theory to leadership has argued that emotional intelligence is a prerequisite for successful leadership.

In their book '*Primal Leadership*' published in 2002, Daniel Goleman, Richard Boyatzis, and Annie McKee, have made it clear that Great Leaders move us by igniting our passion and inspiring the best in us.



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Surely one could talk of leaders' effectiveness because of strategy, vision, or powerful ideas. But the reality is much more primal: Great leadership works through the emotions, in other words even if they get everything else just right, if leaders fail in this primal task of driving emotions in the right direction, nothing they do will work as well as it could or should.

It should be emphasized that Goleman, Boyatzis and McKee are quite clear in their thesis when they maintain that the primal job of leadership is to create resonance, a reservoir of positive feelings, through either resonant leadership styles (emphasizing visionary, coaching, affiliative, and democratic tendencies) or dissonant styles (focused on pacesetting and commanding) and the ability to know when each is most productively applicable.

George (2000) has suggested how emotional intelligence contributes to effective leadership by focusing on five essential elements of leader effectiveness, namely, development of collective goals and objectives, instilling in others an appreciation of the importance of work activities, generating and maintaining enthusiasm, confidence, optimism, cooperation, and trust, encouraging flexibility in decision making and change and, finally, establishing and maintaining a meaningful identity for an organization or a corporation.

Closing it should be noted that the emphasis on the importance of emotional intelligence and, as Kouzes & Posner (2002) have put it in their book, *'leading with heart'* when added to the imperative of involving employees in the conditions of their work, appear to crystallize the transformational leadership profile.

**PART SIX – SCHOOL
ADMINISTRATORS AS
MANAGERS AND LEADERS**

1 WHEN TITLES SIGNIFY ROLES: MANAGER AND LEADER AS THE TWO SIDES OF THE SAME COIN

In this part of our book we will focus on the roles of school administrators bringing forth our belief that primary and secondary school Directors, Head Teachers or Principals in essence are and, indeed in order to be effective and successful they should act as being, simultaneously, managers and leaders.

In this respect we will note that most textbooks and popular books dealing with management and leadership, as well as academic researchers in addition to freelance journalists concur on the view-point that the writings of Fayol (we presented in a summary form the basic tenets of his theory in **part one** of this book) who identified the functions of management as '*planning, organizing, directing, staffing, and controlling*', continue to hold true in our days.

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Fayol's theoretical concepts have kept their validity through time and became even more relevant as the emphasis on the '*manager-leader*' became an urgent reality through the vast and historically unprecedented development and global prevalence of large scale enterprises and organizations.

We humbly assume that **part five** of this book has provided the readers with adequate clarification of the concept of 'leader-manager'. It should be reiterated, however, that while the terms '*leader*' and '*leadership*' were eminent in philosophical discussions and treatises from antiquity on to modern times, early in the 20th century, with the advent of large scale industrial enterprises and organizations, the terms '*manager*' and '*management*' made their appearance coming to the forefront as key concepts and leading topics dominating academic discussions, research efforts and popular media.

Shifting our attention to educational processes and specifically to primary and secondary schools, we will be confronted with what seems to be a consensus, on a global scale, namely that the administrators of primary or elementary schools are usually referred to as Directors while the administrators of lower and upper secondary schools are referred to as Head Teachers or Principals.

In the not so distant past in Great Britain, and some other English speaking countries, the title Head Master (referring to a man) and Head Mistress (referring to a woman) was encountered with some frequency but nowadays the more gender-neutral title Head Teacher is used extensively.

Within the microcosm of the schools a careful examination will reveal that some persons holding positions as Directors of primary or elementary schools and Head Teachers or Principals at junior or senior secondary schools tend to perceive themselves and project their roles as administrators of the '*first among equals*' type ('*primus inter pares*' Latin, 'πρώτος μεταξύ ίσων' in Greek).

This self-perception among school administrators should not be perceived as emanating from a self-aggrandizing sense of personal '*nonchalant or narcissistic*' magnanimity but rather from a pervasive tendency of avoiding the definition of their roles as '*managers*' which they see more fit for the business world or as '*leaders*' which they construe as belonging mostly to the sphere of politics.

On the contrary, however, the reality on a global scale is that Directors and Head Teachers or Principals are both '*managers and leaders*' and the most successful among them are those '*that have what it takes*' and manage to blend efficiently, creatively and productively the two roles in the daily exercise of their administrative duties.

In State supervised and controlled school systems across the world, there is a tendency for those who have the authority to hire, who are usually City, State, Region or National Education Central services personnel, to make the appointments to administrator positions in primary and in secondary schools. These, centrally made appointments, are commonly based on the criteria of the appointees' seniority in service, of post graduate training and degrees they hold or on a combination of both.

No one will deny the fact that seniority does signify amassed on the job experience while post graduate degrees verify the acquisition of relevant academic knowledge. Additionally, most certainly and undeniably, they both belong to the category of objective selection criteria. Indeed, on a worldwide basis there are countless examples of so chosen appointees who, with the passing of time, turn out to distinguish themselves as successful school managers and leaders.

Things differ, however, with private schools where, again across the world, beyond the selection criteria of seniority and academic training, the candidates' personality and leadership talents are taken into consideration when appointments are made at the top school administrator level positions. Such a combination of selection criteria ensures that pupils, parents and the community at large may benefit from persons who '*have what it takes*' to be successful school administrators as managers and leaders.

We can assume, with a fair degree of safety, that the readers of our book, students in education or in management or practitioners in either field, as well as members of the general educated public, have come across the phrase frequently encountered in the Mass Media of Communication which attempts to differentiate the concepts of manager and leader stating that "*managers are people who do things right and leaders are people who do the right things.*"

Bennis and Nanus (1985) in a book titled '*Leaders: The strategies for taking charge*' considered leadership and management as two distinct concepts. For the two authors leaders are the persons who influence others and provide visions, while managers are the persons who master routines and thus accomplish prescribed activities. In their book they introduced the phrase quoted above, which has been sometimes also credited to management guru Peter Drucker.

Be that as it may, it would be hard to pin-point and identify specific periods in history when, beyond the theoretical schemes and discussions in academic realms and popular journalistic rhetoric in the Mass Media the concepts and practice of management and leadership as applied by real persons to real activities of corporations and organizations were actually two distinct and separate realities.

The concept of leadership appears to draw from and is considered as a legitimate study subject in a number of scientific fields including philosophy, history, political science, sociology, psychology, military science and theology.

We should point out and call your attention to the fact that as existing experience verifies the concept of management is a legitimate area of interest for most of the same scientific fields mentioned above.

It has become an observable reality in both academic circles and popular media that with the passing of time, a grey area has emerged concerning the similarities and differences between Leaders and Managers as persons, and Leadership and Management as a process revealed by the observable behaviour of such persons.



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In the daily routines in all facets of the world of corporations and organizations as well as in most educational institutions, subordinates and colleagues expect their managers not only to assign them specific tasks, but to define for them a purpose; in other words they view them as *leaders*. And, vice versa, managers operating as *leaders* organize their subordinates, the people they supervise and interface with, so as not only to maximize efficiency, but to nurture skills, develop talent and inspire.

The Administrators in the microcosm of a school setting, Directors, Head Teachers or Principals must creatively utilize, as managers in corporations and organizations do, all available human, fiscal, material and technological resources they have in their disposal in order to successfully bring to reality the goals which have been set up, described and defined for the education system by the appropriate local, State or National Authorities.

Fiscal, material and technological resources available, across the globe, to primary and secondary school administrators vary according to the funds allocated to education by each local, regional or National authority. Understandably, such resources are better in countries with higher GDP and more restricted in countries with lower GDP. Realities, however, are different in both richer and poorer Nations when we are dealing with so-called 'private schools'.

Looking at these matters from an economics viewpoint as education throughout the world is considered to be a 'labour intensive' industry, the school administrators can prove that they are talented as 'managers-leaders' not so much by their successful handling of fiscal, material and technological resources they have at their disposal but rather by the proper utilization, coordination and creative management of their school's human resources.

The *human resources* in primary schools who fall under the supervision of the school Director and deputy Director include the teachers, who on a worldwide scale, as a rule, hold a university degree in education awarded by relevant education departments, assistant teachers and auxiliary personnel.

In junior and senior secondary schools the teaching staff, who are usually called '*professors*' in some parts of the world, are trained professionals who hold a university degree in the subject which they teach, in physical and natural sciences and maths (mathematics, physics, chemistry, information and communication technology, geography) or in liberal arts (literature, languages, philosophy, history, sociology, psychology, political science, business and economics) and health and physical education instructors and athletic coaches who hold relevant university degrees from physical education departments.

Furthermore, the *human resources* in secondary schools who are supervised by Head Teachers, Principals and their deputies or assistants, include assistants to teachers and professors, nursing staff, autism/behaviour specialists, librarians and ICT lab technicians, grounds and buildings caretakers, janitors and cleaning staff, chefs, food specialists and kitchen personnel when school meals are provided as well as bus drivers and escorts in schools where transportation is provided for students to and from the school.

In primary or elementary level special education schools, across the globe almost as a rule, the teachers hold degrees in special education awarded to them by education departments of universities or teacher academies. In secondary level special education schools the teaching staff hold university degrees in the subject they teach and, additionally, many of them have acquired before being employed or during the course of their employment some training in gaining understanding of the personalities, behavioral characteristics and special needs of their students.

In both the primary and secondary special education schools the students and the teaching staff are supported by the presence of a team of health and behavior specialists, which depending on the financial status of the schools may include persons employed on a permanent/full time basis or as temporary, part time staff (psychologists, social workers, speech therapists, physiotherapists, ergo therapists/occupational therapists, school nurses, sign language teachers/qualified teachers of students with hearing impairment, and teachers of braille for visually impaired students).

As relevant needs may arise in most special schools around the globe the administrators may call upon the services of child and adolescents psychiatrists and neurologists. The specialist support staff, parallel to the services they provide to students and teaching staff, interface with parents of students providing them with useful advice and reports on the students' status and progress in the school.

During the last two decades of the 20th century and, with increasing frequency, during the first two decades of the 21st century, the global tendency is for teaching staff and health/behavior services personnel in both primary and secondary regular schooling systems as well as in special education schools to have earned a post graduate degree such as Master of Education (M.Ed.), Master of Science (M.Sc.) or Master of Arts (M.A.) in their field of activity and expertise. Indeed many school administrators holding positions as Directors, Head Teachers and Principals hold doctoral degrees in their field of university training and expertise, which is usually either a 'D.Ed.' or a 'Ph.D'.

2 SELECTED DUTIES AND RESPONSIBILITIES OF PRIMARY AND SECONDARY SCHOOL ADMINISTRATORS

We have highlighted in the previous chapter the fact that modern school administrators in publicly financed primary and secondary schools are usually selected and appointed by local, regional or national ‘authorised’ personnel on the basis of two objective criteria namely, their seniority in service and academic credentials.

We furthermore pointed out that appointments to the top school administration posts have additional criteria when we look at the selection processes characterizing privately owned primary and secondary schools.

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In both cases, on a worldwide scale, we cannot exclude some political criteria that may play a role in the decision making process of making top school administration appointments. For reasons that could be easily understood by our readers this is a practice which occurs more often in public and less often in private schools.

Men and women, as the persons appointed to the top administrative post of school Director, Head Teacher or Principal, upon their appointment assume prescribed roles the details of which are outlined in the relevant and appropriate 'job descriptions'.

These job descriptions signify and clearly highlight what the governing authorities, local, regional and national education departments in the case of publicly funded institutions, and Boards of Directors of owners-stakeholders in the case of privately owned schools expect of them as top managers.

Students of management and education schools and departments are usually taught in one or more of their modules and also encounter and read in relevant bibliography what are the duties of those persons holding a top administrative post in a public or private company or in a public or private primary or secondary school.

The duties and responsibilities of Directors, Head Teachers and Principals are usually classified either as 'internal' concerning the day-to-day operations inside their school or as 'external'.

In academic jargon as well as in popular Mass Media language it will not be surprising to find references to a '*Decalogue*' of school administrators' duties and responsibilities. This term originates etymologically from the Greek word 'δεκάλογος' meaning 'a set of ten rules' considered fundamental, in Latin '*sine qua non*', in specific realms and it is also somewhat reminiscent of the Biblical reference to the '*Ten Commandments*'.

It is also fairly common, on a worldwide basis, to find references to the '*pentathlon*' of the school administrators' duties and responsibilities. This term originates etymologically again from the Greek word 'πένταθλο' meaning '*five competitions*' which in ancient Olympics included running the stadium length (about 200 yards), long jump, throwing the discus, throwing the javelin, and a wrestling match between the best two athletes in the previous four competitive sports. In modern Olympics the pentathlon is made up of different sports events.

Bringing matters to a practical, hands-on-the-job management level, the school administrators' duties within the school usually include, but are not exhausted, by the following:

Inside the school acting as an example of proper administrative and educational '*role model*' for the teaching and auxiliary staff and labouring to create positive human relations among school employees.

Creating and maintaining positive work place ambience between teachers and students, as well as between teaching and auxiliary staff members.

Monitoring of teachers work and performance as well as the work and performance of all other personnel who are employed by the school.

Frequent visits to classrooms in order to have first-hand impressions of the teaching process and inspection of the schools buildings and grounds.

Holding group meetings with teachers at least once every two weeks in which various problems and various matters which are related to curriculum, to students' behaviour and concerns are discussed and suggestions for improvements and solutions are presented.

Holding group meetings at least once every two weeks with auxiliary school personnel in which problems are brought up and suggestions are generated for resolving them and for applying solutions.

Being well aware of the status of interpersonal relations among their employees and acting timely to prevent strifes and tensions on this interpersonal level, to intervene as arbitrator effecting reconciliation and, if and when unavoidable, act as a 'fire-fighter'.

Creating and maintaining careful administrative records concerning all aspects of the school's operations from curriculum to finances.

Outside the school the administrators' duties usually include but are not exhausted by the following:

Keeping a two-way open door communication with relevant Supervising local, regional and national education authorities.

Relating to parents and their association as needed and holding, usually, monthly meetings aimed to keep parents informed of the progress of their children and adolescents in their studies and in exchanging views and assessments on general problems of the school.

Relating to the community businesses, corporations and organizations by implementing good public relations which may ultimately benefit their school and their students resulting in donations and sponsorships which usually create goodwill opportunities and generate funds that are not available to the school, the students and school personnel from the available State resources.

Creating and maintaining good working relations with other State and private Agencies and authorities including Hospitals and the Police that can prove useful if and when needed.

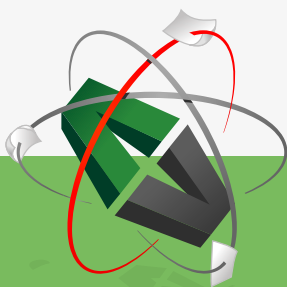
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School administrators performing their roles as Directors, Head Teachers or Principals in an efficient and professional manner, directly and indirectly, ensure the smooth operation of their domains.

Modern school administrators will stand out if, over and above the possession and application of necessary management skills and responsible performance, they possess the creative ability to become successful '*managers and leaders*' of their schools.

In the following chapter we will highlight the characteristics that describe such persons.

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3 CHARACTERISTICS OF SUCCESSFUL SCHOOL ADMINISTRATORS AS 'MANAGERS AND LEADERS'

We have discussed in previous parts of this book the concepts of management and leadership and briefly presented the relevant research efforts and theoretical formulations identifying and describing the personalities of successful managers and leaders.

We assume that there should be no challenge to the assertion that a good manager can manage efficiently while a good leader can lead effectively. What should be highlighted in the context of our presentation is that those persons who prove to be successful managers can, simultaneously, be outstanding leaders.

In this chapter, following this line of thought, we will briefly present and highlight some contemporary published work specifying the characteristics of administrators performing on a daily basis their roles as successful managers and leaders in the microcosm of the school systems in which they are serving.

We will remind our readers, at this point, of the reference we had made to the research work and contributions of Dr Ouchi to the theory of management. As you will recall, Ouchi's theoretical contribution was highlighted in **part one** of our book when we presented his 'theory Z' which some consider as an alphabetic extension to McGregor's 'X and Y' theories.

We bring to the attention of our readers another book authored by Dr Ouchi and published in 2003 with the title '*Making Schools Work – A Revolutionary Plan to get your Children the Education they need*' in which he presented the results of his research project involving some 223 schools in 6 different cities which was funded by USA's National Science Foundation.

In this research project, removed from the business and corporate world and focusing in primary and secondary education, professor Ouchi and his team examined innovative school systems in the cities of Seattle, Houston and Edmonton, Canada comparing them with more traditional school systems in New York, Los Angeles and Chicago.

On the basis of his research findings professor Ouchi made the assertion that a school's educational performance, leaving all other parameters aside, may be most directly affected by how the school is managed or, expressed from another point of view, '*it is management philosophy and style that relates directly to a school's successful performance*'.

We feel that Ouchi's *thesis* is both relevant and useful in the context of our current discussion. Taking it a step further and adapting it to our thesis we wish to highlight that in reality there exists a crucial relationship of successful school administration with successful implementation of effective '*management-leadership*' by talented Directors, Head Teachers and Principals performing as '*managers-leaders*'.

2.1 THE CASE OF LONDON'S 'TOWER HAMLETS' EXPERIENCE

Professor David Woods, professor Chris Husbands and Dr Chris Brown (2013) have presented a list of 8 specific characteristics that are shared by, characterize and describe successful school administrators in their roles as *managers and leaders*.

They make their point and highlight these specific 8 characteristics in a report published in November 2013 by the Mayor of Tower Hamlets under the title '*Transforming Education for all: The Tower Hamlets Story*'.

The report and the findings are based on the actual story of the transformation of schools in one of London's poorest areas from among the worst performers in all of England to one of the best in the world.

The 8 characteristics listed below describe successful school administrators as '*managers and leaders*':

They have consistent, high expectations and are very ambitious for the success of their pupils.

They constantly demonstrate that disadvantage need not be a barrier to achievement.

They focus relentlessly on improving teaching and learning with very effective professional development of all staff.

They are expert at assessment and the tracking of pupil progress with appropriate support and intervention based upon a detailed knowledge of individual pupils.

They are highly inclusive, having complete regard for the progress and personal development of every pupil.

They develop individual students through promoting rich opportunities for learning both within and out of the classroom.

They cultivate a range of partnerships particularly with parents, business and the community to support pupil learning and progress.

They are robust and rigorous in terms of self-evaluation and data analysis with clear strategies for improvement.

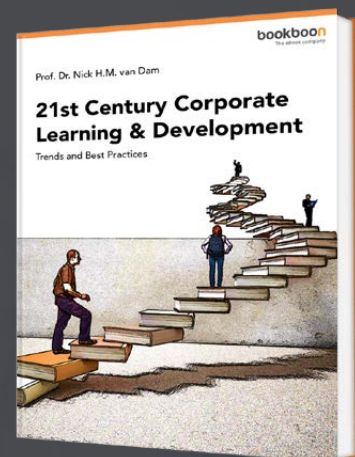
2.2 JEREMY SUTCLIFFE'S 'DESERT ISLAND CHALLENGE'

Proceeding with our aim of presenting and highlighting the characteristics of successful school administrators as successful leaders and managers we come across the work of Sutcliffe (2013) in a book based on research and interviews with some of the UK's best Head Teachers.

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Published with the title '*8 Qualities of Successful School Leaders – The Desert Island Challenge*' Sutcliffe has spelled out 8 qualities of successful school leaders which are presented in the Guardian teacher network/teacher blog.

Nick Morrison (2013) highlighted Jeremy Sutcliffe's book and listed the '*8 qualities*' in a relevant article he contributed to Forbes.

The following are Sutcliffe's 8 qualities as presented in both of the above publications:

1. *Vision* – It may appear easy to dismiss the concept of “vision” but the best school administrators turn out to be visionaries with a clear sense of moral purpose. Successful leaders have “great vision – the ability to formulate and shape the future, rather than be shaped by events”.
2. *Courage* – Successful school managers-leaders show great determination, with the willpower and patience to see things through. They are willing to take risks and are steadfast in challenging under-performance or poor behaviour.
3. *Passion* – Successful school managers-leaders are passionate about teaching and learning and show great commitment to children. They take an active interest in their pupils' work – and that of their staff.
4. *Emotional intelligence* – Successful school administrators are team-builders. They understand the importance of relationships, empower their staff and pupils and show great empathy.
5. *Judgment* – The best Head Teachers show great judgment, make the right calls and are wise leaders. Crucially, however, it isn't simply a matter of acting alone. It's about involving the whole school community and taking people forward together.
6. *Resilience* – The business of headship is full-on and, at times, gruelling. Successful school administrators are optimistic and resilient, remain calm in a crisis and are energetic and positive at all times.
7. *Persuasion* – The best school managers-leaders are confident communicators and storytellers. They are great persuaders and listeners, adept at describing 'the story of their school' to any audience. They are also great motivators.
8. *Curiosity* – Successful school administrators are outward-looking and curious. They are excellent networkers and great opportunists, always in touch with events.

2.3 THE WALLACE FOUNDATION REPORT ON THE SCHOOL PRINCIPAL AS LEADER

Continuing our presentation of the characteristics of successful administrators of schools we now bring your attention to the *Wallace Foundation Report* as it is also particularly relevant to our current theme of discussion.

The report (2013) is published on the internet as pdf with open access to the public and is titled '*The School Principal as leader: Guiding Schools to Better Teaching and Learning*'.

The Wallace Foundation document outlines the following five key responsibilities for modern Principals who, in order to excel, must become leaders of learning and develop a team of teachers and other specialists capable of delivering effective instruction.

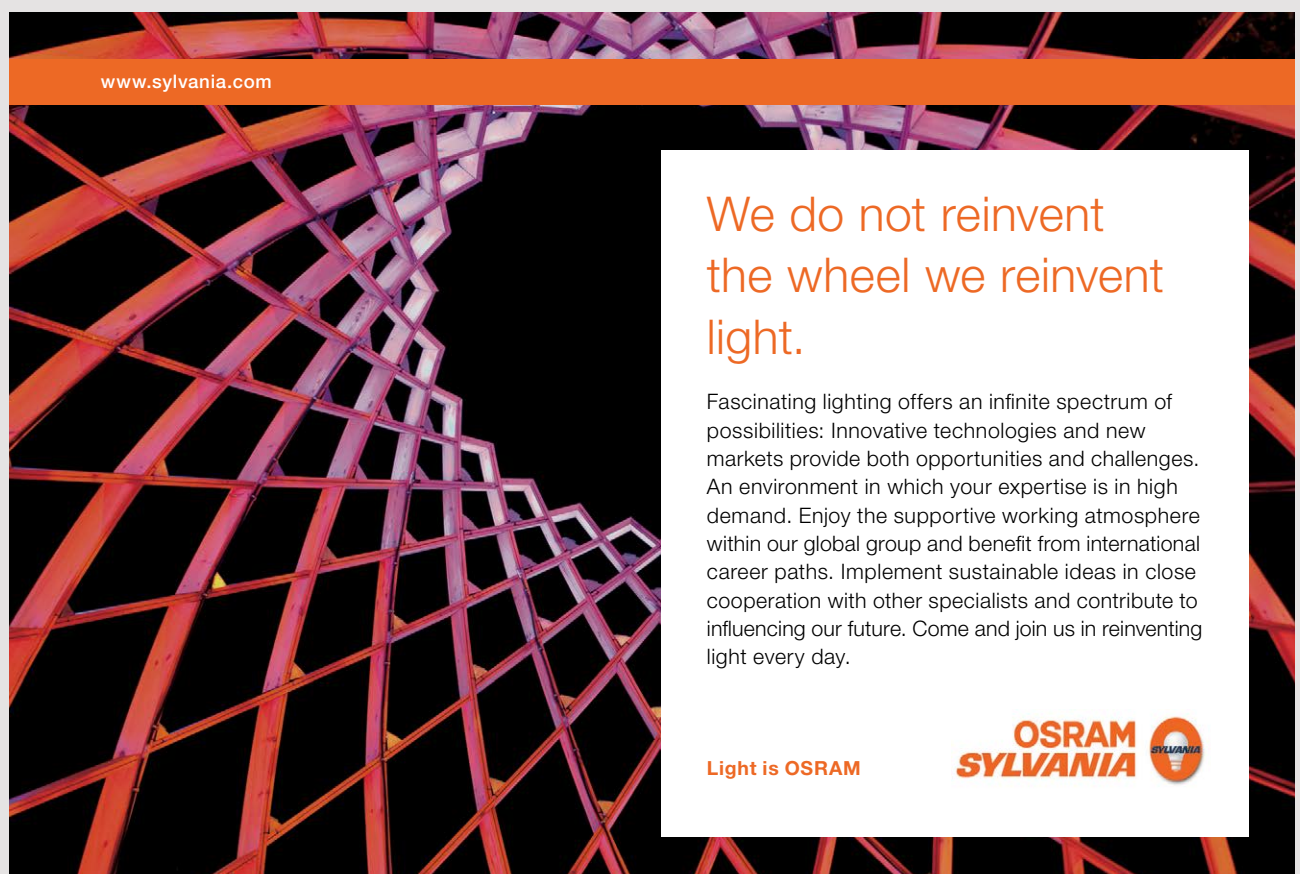
1. *Shaping a vision of academic success for all students, one based on high standards*
(Although they say it in different ways, researchers who have examined education leadership agree that effective Principals are responsible for establishing a schoolwide vision of commitment to high standards and the success of all students).
2. *Creating a climate hospitable to education in order that safety, a cooperative spirit and other foundations of fruitful interaction prevail*
(Effective Principals ensure that their schools allow both adults and children to put learning at the centre of their daily activities. Such 'a healthy school environment' is characterized by basics like safety and orderliness, as well as less tangible qualities such as a 'supportive, responsive' attitude toward the children and a sense by teachers that they are part of a community of professionals focused on good instruction).
3. *Cultivating leadership in others so that teachers and other adults assume their parts in realizing the school vision*
(A broad and longstanding consensus in leadership theory holds that leaders in all walks of life and all kinds of organizations, public and private, need to depend on others to accomplish the group's purpose and need to encourage the development of leadership across the organization. Schools are no different. Principals who get high marks from teachers for creating a strong climate for instruction in their schools also receive higher marks than other principals for spurring leadership in the faculty).

4. *Improving instruction to enable teachers to teach at their best and students to learn to their utmost*

(Effective Principals work relentlessly to improve achievement by focusing on the quality of instruction. They help define and promote high expectations; they attack teacher isolation and fragmented effort; and they connect directly with teachers and the classroom. Effective principals also encourage continual professional learning).

5. *Managing people, data and processes to foster school improvement.*

(To get the job done effective leaders need to make good use of the resources at hand. In other words, they have to be good managers. When it comes to data, effective principals try to draw the most from statistics and evidence. Principals also need to approach their work in a way that will get the job done. The effective Principal takes special care when carrying out his or her most important leadership responsibilities: planning, implementing, supporting, advocating, communicating and monitoring).




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2.4 MITCHELLS' RESEARCH ON THE CHARACTERISTICS OF SUCCESSFUL SPECIAL SCHOOL ADMINISTRATORS

Closing the chapter we consider it useful at this point to refer to some interesting and potentially dialogue and discussion provoking information concerning the characteristics of successful Principals in special education, an area in which the second author of the book you are reading has been and continues to be engaged as a permanent employee for several years.

The relevant information, made available by the author's decision to open public access on the internet, has been presented by Carissa Gail Mitchell in her Doctoral dissertation, submitted in 2011, to the Faculty of the East Tennessee State University.

Mitchell's dissertation title is "*Common Characteristics of School Administrators Who are perceived as Effective in Meeting the Needs of Students with Disabilities*". In this doctoral thesis the author has outlined some major themes which emerged from her research which, as she claims, characterize successful special education school Principals.

We will simply list these themes below without any comments:

The first common theme was that the majority of Principals interviewed had direct contact with special education students.

Secondly, the majority of Principals interviewed indicated that taking responsibility for special education students was a fundamental element of successfully leading those students.

Thirdly, those Principals served as instructional leaders for special education students and their teachers.

Furthermore, those Principals noted that building relationships with parents and having a high degree of competency in addressing the needs of special education students were critical.

Finally, the majority of the Principals interviewed noted that providing services and helping to develop programs that meet the needs of children with disabilities were essential elements of their administrations.

EPILEGOMENA

It behoves us, as an epilogue to this *'primer'* on managing primary and secondary schools, to admit that we have tried to bring forth the fascinating, demanding and challenging realities facing on a global scale the modern school administrators in performing their role as *'managers-leaders'*.

Modern primary and secondary schools and to a lesser extent nurseries and kindergartens, are dynamic complex organizations which, to some extent, resemble Small and Medium Business Enterprises (known and widely referred to as SME's). In making this comparison we keep in mind that with the exception of privately own schools since schools are financed and supported by local, regional and National Education authorities the 'profit' element characterizing SME's is not present.

In the primary and secondary school microcosm, under the auspices of the managers-leaders-administrators a large number of employees as personnel consisting of teachers, assistant teachers, specialists and other auxiliary personnel are serving large numbers of children and adolescents while they also interface with parents and communities, as well as local, regional and national authorities.

As is the case with the management of Small and Medium Enterprises (SME's), Head Teachers, Principals and Directors of modern schools on a worldwide basis have to manage human and financial resources and exercise careful and proper control of buildings and material resources available to their school, ensuring the delivery of the best possible services to their clients, namely their students.

Being the centre-person in a multi-faceted concentric human resources scheme, the modern school administrator must exercise inspiring leadership and efficient management. The administrator, almost as a rule on a worldwide basis, will be the first to receive credit when things go well and the first to be criticized when they do not.

Across the globe, practical experiences have shown that modern school administrators cannot operate in the classic bureaucratic style of *'the man behind the desk'*. In order to be successful in their roles school administrators must operate in the *'hands-in'* style being actively involved with the work of their teaching and other specialist and auxiliary staff and interface with students, parents, the larger community as well as the local, regional and national education authorities.

Based on research findings and practical experiences special emphasis should be given to the relationship of the school administrator with the pupils' and students' parents both on the individual, one-to-one basis, as well as the broader interface with the parents' association. It is in this area of the interaction with the parents' association that the modern school administrator, as leader and manager, must possess the necessary knowledge and expertise and deploy special verbal, public relations, psychological, sociological and at times political skills as they come into focus.

In the process of unfolding this particular interaction and interface, the administrator's skills listed above can be beneficial to the school when the administrators succeed in developing positive relationships and create positive ambience with the parents' association and, vice versa can be detrimental if they fail to do so.

The dynamic relationships between administrators and parents' associations, as well as the relationships and interactions with local communities and sponsors are some examples of cases where for modern primary and secondary school administrators, while seniority and university degrees do play their roles personality and human relations skills may, sometimes, assume protagonist roles.



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School administrators are human beings, not impersonal automatons and robots, and so as they interface with their staff it is expected that they will develop stronger feelings for some of them creating what is worldwide commonly referred to as '*favourites*'. School administrators should be aware of this human tendency and should make special efforts in avoiding creation of '*favourites*' as this could lead to serious problems with the rest of the staff and may end up in lowered motivation.

Problems are a daily reality in every primary and secondary school in every education system all over the world and the expectancy of staff, students, parents and relevant State authorities is that the school administrator as Director, Head Teacher or Principal is the person that will manage to keep calm and composed in times of stress and crises and will help all those involved by offering solutions.

To be able to offer solutions and sustain the necessary checks and balances among the persons they supervise the school administrators, in order to be successful managers and leaders, must possess and maintain the patience and the capacity to be good listeners.

Closing we will reiterate that in the last few decades there has been a vivid debate on the seemingly paradoxical question if management is really a science, as it is taught in business schools worldwide, or an art, as it is manifesting itself in situations where going beyond the scientific descriptions, brilliant decisions taken by creative individuals lead to success of the corporation or the organization they manage.

We do not consider it overly risky to claim that management can be both a science and an art culminating in a dynamic synthesis which, when applied wisely in the proper context, will bring benefits and not endanger the well-being of employees and organizations.

Each and every time some brilliant managers go beyond their scientific training calling for order and cause-effect analysis in decision making and become visionary '*artists*' in utilizing all available human, financial, material and other resources and achieve positive results they solidify the philosophical undercurrent theme considering management as both an art and a science.

The successful administration of modern regular as well as special primary and secondary schools by educators able to act when the circumstances call for it as '*leaders-managers*' continuously reinforces the above theme of management being both a science and an art.

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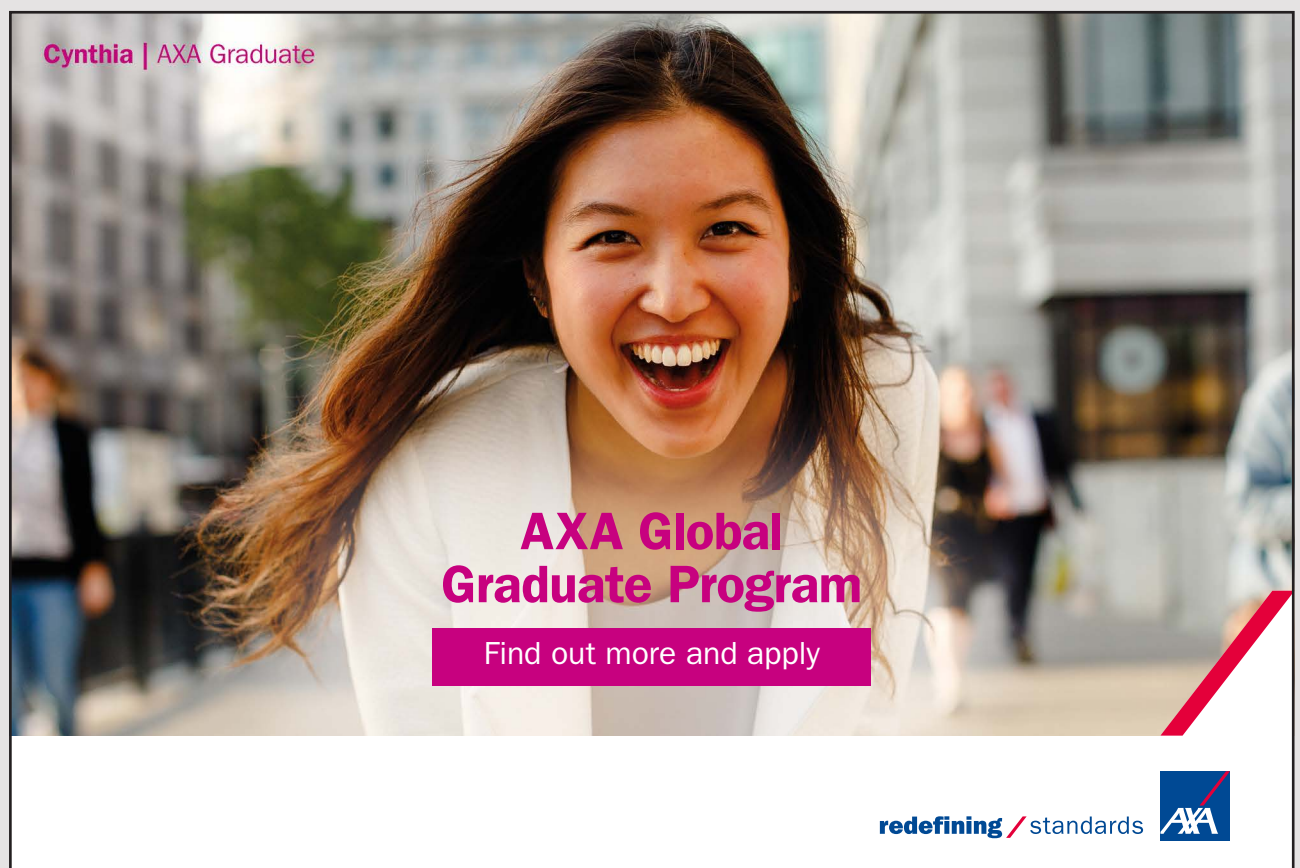
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