

# **Politics, Education and Social Change**



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## Introduction

Education is a force that changes the face of individual people, whole societies, countries. Metaphorically speaking, there is a treasure hidden in education, although it is possible, following Francis Bacon, to express the importance of education more sharply, that knowledge is power, or, following Michael Foucault, that knowledge gives power. Undoubtedly, knowledge, education cannot be underestimated. Nor is anyone surprised today by the growing interest in education or, more precisely, in its effectiveness – a direction developed since the late 1970s as a reaction to the report by James S. Coleman’s Equality of Educational Opportunity report<sup>1</sup>. Published in 1966, the results of Coleman’s team questioned the meaning and relevance of schooling – they showed that there was little relationship between the conditions of schools and student achievement. Good or bad schools were determined by the socio-economic status of the environment, which permeated the schools setting limits on pupil achievement. As a result, political and educational debates were linked to the problem of social inequality in education. This direction has dominated the academic search in the international field, which has naturally been strongly linked to educational policy by pointing out its neglected areas as consequences of failed interventions at the system level. The more than half century that has elapsed since then has widened the scope of identified neglect and the scope for necessary improvement both at the level of schools and the educational system as a whole.

The need for a more effective approach emerged in addressing the challenges that have been identified at various levels of system management concerning more successful policy formulation of the decisions that are undertaken and implemented. This broad orientation of the relationship of policy and education in social change also determines our research and analysis of the authors of the publication. On the one hand, we point out issues that are old and unsolved,

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1 J. S. Coleman (with: E. Q. Campbell, C. J. Hobson, J. McPartland, A. M. Mood, F. D. Weinfeld, R. L. York), *Equality of Educational Opportunity*, US Government Printing Office, Washington 1966.

although already embedded in new contexts, as well as new ones that require solutions that are often still unknown in national, global contexts. On the other hand, we zoom in on our own research or meta-analyses from the studies of others including comparative ones, in order to provide better documentation of the essence of the problems whose solution is within the scope of educational policy. We perceive the direction of enhancing the effectiveness of education as an opportunity for social change in these selected, emphasized research fields. In the world around us, described through the perspective of progressive complexity over time, education is becoming the only real condition for participation in society. “The world has taken another shift; many of its inhabitants, unable to withstand the rapidity of the changes, fell out of the vehicle that was speeding faster and faster, and even more numerous numbers of those who did not get inside in time never managed to catch up with the vehicle again and take the journey further”<sup>2</sup>.

The group of “passengers” also includes policymakers, researchers and “ordinary” citizens. Therefore, we are all obliged to ensure that children and young people have the right to take responsibility for themselves and others in the co-created world. In the compiled chapters, the commitment to the development of science, education emerges. As advocates of an equitable and highly effective education system, the research fields we present are analyzed at the intersection of education and politics in close connection with their potential for social change.

The significant differences in the effectiveness of educational systems, which the PISA studies have clearly shown, provoke not only the question of the reasons for this situation, but also the opportunity for improvement. Therefore, the prominence of the PISA studies in creating educational policy occupies an undisputed high position. This can be interpreted as a recognition of the value of research in the educational policy of countries, which has been strengthened by the processes of globalization. It can also be considered that the opportunity to influence students more effectively is gaining increasing political support among creators of education, and it can be assumed that the relationship between policy and research will become increasingly close. Our study, although it does not aspire to provide a complete answer to the questions posed above, which even on the basis of the existing research base is beyond our capabilities, nevertheless, the direction we have taken seeks to demonstrate the potential of education and policy in a social change. Sharpening education policy in order to “catch up” with the top of the PISA. This seems to be grounded in the motto: small steps to big change.

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2 Z. Bauman, *Życie na przemiał*, Wydawnictwo Literackie, Warszawa 2004, p. 15.

Frequently, the role of education policy is focused on the shaping of input resources, which in the colloquial sense is reduced to the planning of an appropriate amount of financial resources for education. However, this approach is too narrow and naive, as the power behind policy's impact on education, even at the central level, is much broader. Therefore, the interpretation of improving education by increasing its funding is merely a myth. Central interventions can (and should) be reinforced at the meso and micro levels, which, in a nutshell, strengthens the power of impact and determines effectiveness. Our approach at this point is in accordance with the theory of action, as interpreted and analyzed by Helmut Fend in the offer-and-use model of educational effectiveness developed.

The book entitled *Politics, Education and Social Change*, reveals the fields of interest of six researchers who settle their studies and research at the intersection of politics and education in order to bring out their potential in social change. For us, education is too crucial to abandon its importance in individual and collective life. Therefore, our analyses have been undertaken at both the national level – to demonstrate examples of the changes being made and their effects, and at the international level – with the aim of viewing the directions and potential for top-down change from a macro perspective, with examples from countries: The United Kingdom and the People's Republic of China representing two different cultures: western and eastern. This is determined by the adopted layout of six chapters. The first chapter – introducing the potential of educational change at the macro (system) level as viewed by both Polish and foreign experts, the next three chapters exemplifying the implementation of individual sectors (areas) in Poland's educational policy. While the last two provide insight into the specifics of the reforms and their effects at the international level. Such a view allows us to gain a deeper glimpse into the potential of education policy for social change both at the macro level (political decisions, reforms) and specific actions within the realities of social life.

In the first chapter: *The effectiveness of education enclosed in myths – “on the other side of the mirror”* Inetta Nowosad used a metaphor borrowed from Lewis Carroll's novel “Alice in Wonderland”. This is meant to draw attention to the fantastic, unlimited world, which we are all subjected to, i.e. the world ruled by myths and mythical thinking. In this sense, myths are special cognitive models that defy of the laws of logics. They constitute a foundation for an irrational perception of reality. Myths stand in opposition to roles ascribed to education, as well as to the importance of knowledge. Hence, decisions concerning education reforms, if based on myths and illusions, carry the risk of failure. Accepting myths undermines the sense of School Effectiveness and Improvement and makes it impossible reach the level of world class school systems. It prevents any systemic initiatives from taking roots within the education system, even if Mi-

chael Fullan optimistically believes that large scale reforms have come of age. This chapter unmask myths permeating educational reforms that are rooted in the decisions of politicians, social environment or even teachers. It also draws attention to the power that knows no spatial or temporal boundaries. The context of a country in which they are anchored was an inspiration to recognise the findings of Polish and international research and to analyse policies for planned and already implemented reforms. All these activities are meant to uphold the importance of scientific research as a basis for all important decisions. They are also related to the dissemination of myths that occur when reforming education. In other words, they are meant to unmask “conventional wisdom”. It seems that the only way to get out of the deadlock would be to take the side of science and reason, i. e. to follow scientific evidence rather than an imaginary figment of reality.

The second chapter, *Educational policy and doctoral students in Poland. Idea and reality* by Agnieszka Gromkowska-Melosik, attempts to capture the views (and awareness) of doctoral students of Polish doctoral studies and doctoral schools at Polish universities against the background of the government’s policy towards universities. It consists of two main parts. The first, the theoretical one, is devoted to the doctorate and its significance, both in the context of the opportunities gained through it for an individual to create his or her biography, and particularly his or her career and in the symbolic context – as an emblem of prestige and still a certain elitism, as well as intellectual potential. The various contexts of socialization of doctoral students into scientific and social roles are also presented here. In addition, the changes in the situation of doctoral students, both institutional and biographical-scientific, related to the resulting legal acts are also shown. The law is seen here in the context of the legislator’s power to create a new reality and its boundaries – a de facto form of exercising power over institutions and individuals (here: doctoral students). The second part of the text contains the author’s qualitative research results. The participants were doctoral students (ten people) from doctoral studies and doctoral schools of six large Polish public universities. The purpose of the research, conducted through interviews, was to understand the participants’ perceptions of selected aspects of their scientific and social functioning – institutionally organized. The data obtained were analyzed and interpreted on the following dimensions: doctoral students’ perceptions of the idea of scientific development, their functioning as students and researchers, and their role as promoters. The research was placed in a constructivist paradigm.

Chapter three, *Harm reduction after the time of pandemic – new micro-policy perspectives at the level of educational organisations* written by Marzanna Farnicka and Inetta Nowosad draws attention to the potential and possibilities of creating educational policy at the lowest level of management and organisation in

the educational system, namely the organisational level. Shaping micro-policy for educational organisations is closely related to development planning and the adoption of a specific operating strategy that is consistent with a community-accepted vision. It emerges from the need to create optimal conditions for internal development in schools and other educational institutions. The pace of change makes the world more unstable, complex and uncertain. It also reinforces the need for organisations to respond more quickly to emerging challenges. The Covid-19 pandemic was a ‘reality check’ of old ways of managing, and it also confronted all countries with the need to face a new, unknown reality. From today’s post-pandemic perspective, it can be pointed out that experiencing and dealing with risk is an everyday reality in which we need to focus more on the quality of the processes that take place at the organisational level.

The chapter focuses on pandemic stress and its consequences for educational organisations during re-adaptation to life after the pandemic. It presents important and useful concepts of coping with stress at different organisational levels. The presented operationalisations of the pandemic stress approaches indicate that the way in which the pandemic was experienced might involve various reactions. Moreover, the chapter discusses consequences of the pandemic stress which should be treated as challenges for education from the perspective of the members of educational organisations and from the perspective of their functioning. Furthermore, it is pointed out that coping with the consequences of pandemic experiences involves not only damage assessment but also the measures taken to reduce damage. In this perspective, proposals and strategies for building resilience at the level of educational organisations are presented. Resilience is treated as an individual resource that includes self-control, self-efficacy, resourcefulness, sense of humour, valuation and coping with events. Building resilience goes through stages, which have been described in the chapter from the perspective of educational organisations and their members.

Chapter four, *Educational policy towards ethnic minorities in the educational system in Poland after 1989 on the example of the Lemkos* was written by Arkadiusz Tyda. The author analyzes the legal conditions for the development of minority education in Poland, as well as the functioning of the Lemkos in the educational system as a case study. Lemkos are one of the four legally recognized ethnic minorities in Poland, marginalized by the authorities in the times of the People’s Republic of Poland. In order to give a fuller picture of the situation of education policy, it was necessary to present it in relation to earlier times. The year 1989 is a special watershed in the history of Poland, because then the state system was democratized, and national and ethnic minorities became the subject of educational policy. In the following years, the right to education for minorities in their native language was constitutionally and legally guaranteed. The most

important legal document was the Act of 6 January 2005 on national and ethnic minorities and on the regional languages. With its adoption, the Lemkos obtained the status of an ethnic minority, and their language became one of the 15 recognized minority languages in the Polish state. Teaching of the Lemko language was introduced into the Polish education system at the beginning of the 1991/1992 school year and to this day it has appeared at every level of education, including academic teaching.

In chapter five, *Episodes in English education reform – from Thatcher to Brexit* Marcin Gierczyk focuses on selected reforms to the education system in England. In England, much like in the rest of the world, the past decades of educational reforms have strongly reflected the dominance of neoliberal thought within the rest of society, including economic and social policy sectors. A desire to improve educational outcomes can be seen in the major education reforms that were introduced in the 1980s and in subsequent decades. While neoliberalism is at the heart of much of these changes, the rise of neoconservatism and the influence of industrialism and welfarism have also created new challenges and opportunities for education reform. The four ‘grammars’ of neoliberalism, neoconservatism, industrialism, and welfarism, as they are referred to in this chapter, can be used to trace the reforms that have taken place in England from Margaret Thatcher’s government to Brexit. This chapter seeks to present selected reforms in education in England. The reconstruction of these time periods is not intended to be exhaustive; it merely seeks to create a high-level view of the most important trends during the span of these years. The data presented here was consulted with experts on this time period and subject matter.

Chapter Six, *Reform of Chinese shadow education. Competition, hùkǒu, and Double Reduction Policy* by Aleksandra Boroń, based on a selected literature review, aims to describe and discuss recent changes in regulating the private education sector in China. Privet tutoring, referred to in the literature as shadow education, expanded in China during changes that started in the late 70th of the XX century and have contributed to China’s educational and socio-economic development. However, it also had adverse effects, including exposing families to fierce competition and putting pressure on students. In 2021, the Chinese central government implemented the Double Reduction Policy (双减政策 *shuāng jiǎn zhèng cè*), manifesting itself through state interventions in the sphere of jurisdiction. In this chapter, the author will highlight two critical aspects of China’s education system that provide context for understanding the goals of the recent reform: competitiveness and social registration system known as 户口 *hùkǒu*, an institutional barrier that introduces and maintains inequality in Chinese society. Among others, it restricts access to public education for the children of internal immigrants and thus plays an essential role in the sociocultural reproduction of contemporary Chinese families. The author argues that tutoring has been nor-

malized in Chinese society and is likely to continue despite such decisive state intervention. Even some decision-makers, especially at the provincial government level, are involved with private tutoring institutions, providing them with significant funding and support. Due to institutional inequalities in education, social prejudices and stereotypes of vocational education, and the model of social mobility based on a selective examination – many parents in a competitive Chinese society will continue to be interested in tutoring, believing in its significant contribution to the educational success of their children regardless how much they need to pay for it and how hard their children need to study.

\* \* \*

The book considers relationships between politics, education and social change – in various contexts and dimensions. The macro level of educational policy (and politics) is confronted with the micro realities of human biographies. However, the Authors do not consider people who are influenced by political decisions as incapacitated “mass”. They are not helpless, and they have the power to create meanings and independent actions. So, social change always results from these macro-micro connections. This interdisciplinary book includes themes related to political sciences, education, and sociology, which resulted from the Author’s study of contemporary social and education phenomena. It gives insight into interesting paradoxes and controversies, and it does not aspire to give any ultimate interpretations.



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## Chapter 1.

# The effectiveness of education locked in myths – “on the other side of the mirror”

## Introduction

The borrowing from Lewis Carroll’s second novel about Alice’s adventures in Wonderland is not accidental. It is meant to draw attention to the fantastic, unlimited world that is hidden on the other side of the mirror. “The mirror metaphor is a good reflection of the feeling internalised during socialisation (...) that we live in a world full of mirrors”. The glass pane as a metaphor can be a filter of a prominent critic<sup>3</sup> imposing self-cognition and the cognition of the world. The mirror here represents “collective censorship mechanisms” which transform the unconscious into conscious content, embedded between what is knowable and what is difficult or impossible to know. In the meaning adopted in the article, the mirror is a gate, a gate to the world beyond the harsh criticism performed by “rational reason”. Crossing it opens a way without limitations in shaping rules and principles, reveals the world of fantasy and illusion which is hidden “on the other side”. Thus, it opens a path to the creation of myths, whose content plays out somewhere between reality and imagination, between reason and faith. The “mirror pane” is a border, the crossing of which “throws the mind (...) towards something that can be known but cannot be spoken of”<sup>4</sup>. The content of a myth grows out of events, facts and their descriptions, but it causes their mystification, which in turn requires faith.

In this understanding, myths remain special cognitive models, exempt from the laws of logic and carrying hidden meanings which require separate interpretation for each individual<sup>5</sup>. Just like in Alice’s Wonderland, everything seems

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3 See also: an interesting interpretation of the mirror can be found in chapter: A. Gromkowska-Melosik, *Snow White: can a woman free herself from the magic of the mirror?* [in:] *Femininity as a Source of Social and Cultural Unrest Crystallization and Dispersion*, Wydawnictwo Naukowe UAM w Poznaniu, Poznań 2019, pp. 89–90.

4 J. Campbell, *Potega mitu. Rozmowy B. Moyersa z J. Campbellem*, Znak, Kraków 1994, p. 257.

5 M. Klik, *Teorie mitu. Współczesne literaturoznawstwo francuskie (1969–2010)*, Wydawnictwo Uniwersytetu Warszawskiego, Warszawa 2016.

and even becomes possible. It can be assumed that “myths are the dreams of the world”<sup>6</sup>. In this case, “Wonderland inspires, tempts us to find ourselves in it and prompts us to search for new interpretations all the time”<sup>7</sup>. It prepares foundations for a mythical image of reality, or more precisely, as Adam Franke believes, a model diagram of a mythological journey<sup>8</sup>. A myth is not a lie. It is more of a conviction about credibility, even though the myth itself is not true, or at least not fully true.

In the history of mankind, myths have explained phenomena and processes that construct difficult-to-understand “worlds” and we find them in every civilisation since the dawn of time. However, myths not only were, but still are commonplace phenomena. Despite the development of science and globalisation, there still exists consent to their existence in social life. Paradoxically, it is general knowledge and logical premises, including the belief in rationality, that stabilise the impact of myths. “The myth calms down, explains and presents simple solutions, so needed in the era of globalisation and information noise. It offers ready-made recipes and frees us from thinking, determining what is good, who is our ally and which is the right goal”<sup>9</sup>. Myths are comprehensible to their recipients, their way of projecting the perspective of the world or parts of it becomes closer to direct experience. It is readily accessible and makes it possible for us to stay in the crowd of information noise with a ready behavioural pattern. It gives order and meaning to existence<sup>10</sup>, even though it is associated with the “loss of freedom”, as well as strengthens human enslavement<sup>11</sup>. We can say that it is a price “that we pay for a sense of order and shelter in the form of a ready-made model of value, eliminating the need for its intellectual evaluation”<sup>12</sup>. These words can also to some extent reveal the attractiveness of myths, their ease of absorption, durability and, of course, their speed of spreading, which in times of the increasing power of globalisation and social media can make it “travel” much faster than facts. However, in the spreading of modern myths, their functions, as

6 J. Campbell, op. cit., p. 37.

7 M. Jakubowska, *Alicja w krainie słów i obrazów*, [in:] *Literatura prze-pisana. Od Hamleta do slashu*, (eds.) A. Izdebska, D. Szajnert, Wydawnictwo Uniwersytetu Łódzkiego, Łódź 2015, p. 70.

8 A. Franke, *Filmy “Matrix” oraz “Alicja w Krainie Czarów” jako archetypiczne opowieści mityczne*, SBP, Warszawa 2015.

9 J. Włodarczyk, *Współczesne mity polityczne okrągłego stołu oraz IV Rzeczypospolitej jako mity powstania nowego państwa*. “Poliarchia (Polityka wewnętrzna i obronność)”, 1, 2013, p. 142.

10 M. Eliade, *Aspekty mity*, trans. P. Mrówczyński, KR, Warszawa 1998, pp. 8–14.

11 L. Kołakowski, *The Presence of Myth*, trans. A. Czerniawski, University of Chicago Press, Chicago-London 1989, p. 19; B. Schulz, *Opowiadania; Wybóresejów i listów*, (ed.) J. Jarzębski, Ossolineum, Wrocław 1989; T. Biernat, *Mit polityczny*, Państwowe Wydawnictwo Naukowe, Warszawa 1989, p. 306–308. The term “homo Faber” means “skillful man”, “creator”, E. Cassirer, *The Myth of the State*, Greenwood Press, Westport 1983, p. 277.

12 J. Włodarczyk, op. cit., p. 143.

well as their durability, invariably play an important role. It is in this feature that researchers see the unflagging power of myths<sup>13</sup>. Because “myths are relatively persistent, even heavy; sometimes social situation of a group may change, while their old myths keep living in an archaic form”<sup>14</sup>. Myths make individuals and entire societies embark on initiatives.

However, there is also another side, as individuals of a given society can shape myths, leading to their change and persistence over time. In many areas, such as politics, the importance of myths does not diminish. In addition, “in the era of globalisation, myths are transformed, become multilayered and multicultural”<sup>15</sup>. It is this phenomenon that is clearly visible in educational policy, i. e. in designing educational reforms and taking for granted assumptions that are not confirmed by scientific research.

The presence of myths in social life is common and as old as mankind<sup>16</sup>. They are related to accepted behavioural patterns which determine people’s actions and mainly exist within this sphere<sup>17</sup>. Also, myths have no spatial limitations, as they are present in all cultures and societies<sup>18</sup>. However, at the time of their creation, they played a radically different role than today. At their core, they were meant to explain the origin and the historical order of the surrounding reality. With the development of society, myths shifted from the realm of the sacred to the realm of the profane, took control over everyday public life and started explaining problems bothering societies<sup>19</sup>. Hence, the significance of myths manifests itself especially around political dilemmas concerning specific decisions<sup>20</sup>.

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13 M. Golka, *Atrakcyjność mitu*. “Kultura Współczesna”, 1/2, 1996, pp. 42–43; P. Pawełczyk, *Mit jako zjawisko społeczne*, [in:] *W kręgu mitów i stereotypów*, (eds.) K. Borowczyk, P. Pawełczyk, Adam Marszałek, Poznań-Toruń 1993, pp. 10–13.

14 M. Golka, op. cit., p. 43.

15 A. Siewierska-Chmaj, *Mit polityczny jako fundament ideologii. Próba analizy*, [in:] *Przekazy polityki*, (ed.) A. Siewierska-Chmaj, Konsorcjum Akademickie, Kraków-Rzeszów-Zamość 2009, p. 59.

16 For more, see the chapter: *Mity reform*, [in:] I. Nowosad, *Singapur: azjatycki tygrys edukacyjnych reform*, Kraków 2022.

17 A. Siewierska-Chmaj, *Mity w polityce: funkcje i mechanizmy aktualizacji*, ASPRA, Warszawa 2016.

18 H. Domański (ed.), *Myth (entry)*, [in:] *Encyklopedia socjologii*, vol. 2, Oficyna Naukowa, Warszawa 1999, pp. 250–251.

19 See: J. Topolski, *Historiografia jako tworzenie mitów i walka z nimi*, [in:] *Ideologie, poglądy, mity w dziejach Polski i Europy XIX i XX wieku*, (eds.) J. Topolski, W. Molik, K. Makowski, Wydawnictwo Uniwersytetu im. Adama Mickiewicza, Poznań 1991.

20 See: A. Kasińska-Metryka, M. Gołoś (eds.), *Mity i stereotypy w polityce. Przeszłość i teraźniejszość*, Adam Marszałek, Toruń 2010.

They appear to be effective tools in contemporary election campaigns as instruments of influencing the masses and political consciousness. However, according to Olha Vasyuta:

“(...) their use leads to fraud and all kinds of manipulation of public consciousness. Thus, there is a real danger of political alienation, there is social discouragement from the main democratic values and doubts arise as to societies’ potential of monitoring public order”<sup>21</sup>.

Their goal is to manage collective consciousness and human behaviour.

## Educational policy and the effectiveness of education locked in myths

The relations between scientific research and political interventions on the international arena can be shown in the analyses of major research trends in the area of School Effectiveness and Improvement as well as in the scrutiny of key results behind changes within highly effective school systems (Strong Performers and Successful Education)<sup>22</sup>, labelled by Andreas Schleicher as ‘world class school systems’<sup>23</sup>. Throughout the past thirty-five years, the literature documenting research on the quality and effectiveness of education, as well as School and System Improvement, has been greatly expanded and reinforced with specific preconditions for an effective change at the level of the entire system. Based on the insofar confirmed results of international research, Michael Fullan believes that ‘a large-scale reform comes of age’<sup>24</sup>. Similar conclusions are drawn by other leading researchers, such as Bernt Cremmers<sup>25</sup>, David Hopkins<sup>26</sup> or Reynolds<sup>27</sup>. The potential of influencing all schools in order to reinforce the learning capacity

21 O. Vasyuta, *Mit jako fenomen współczesnej polityki*. “Warmińsko-Mazurski Kwartalnik Naukowy”, 1, 2012, p. 120.

22 OECD, *PISA 2009 Results: What Makes a School Successful? Resources, Policies and Practices, vol. IV*, OECD Publishing, Paris 2010; OECD, *Strong Performers and Successful Reformers in Education: Lessons from PISA for the United States*, OECD Publishing, Paris 2011.

23 A. Schleicher, *World class: how to build a 21st-century school system*, OECD Publishing, Paris 2018.

24 M. Fullan, *Large scale reform comes of age*. “Journal of Educational Change”, 2 (10), 2009, pp. 101–113.

25 B. P. M. Creemers, L. Kyriakides, *The dynamics of educational effectiveness: A contribution to policy, practice and theory in contemporary schools*, Routledge, London 2008.

26 D. Hopkins (ed.), *Transformation and Innovation: System Leaders in the Global Age*, London 2007; D. Hopkins, J. Munro, W. Craig, *Powerful Learning: a strategy for systemic educational improvement*, ACER Publishers, Melbourne 2011.

27 D. Reynolds, *School Effectiveness, School Improvement and Contemporary Educational Policies*, [in:] *Contemporary Educational Policy and Politics*, (ed.) J. Demaine, Macmillan, London 1999, pp. 65–81.

of all pupils has gained not only great interest, but also international recognition. The progress of constantly acquired and expanded knowledge is well-illustrated by the developmental phases within educational effectiveness and improvement, both at the level of schools as well as at the level of the entire school system.

Period	Educational Effectiveness Research (EER)	School and System Improvement (SSI)
1970s	Early studies (e.g., Edmonds, 1979)	The organizational culture of the school
1980s	“Foundational” issues, stability, etc.	Action research, research at school level
1990s	Conceptual multilevel models, internationalization	Managing change, comprehensive school reform
2000 onwards	EER as a set of dynamic relationships	Local, above-school level, and systemic improvement
Methodological advances		

Table 1. Developmental stages in each of the fields as interpreted by the author: Jaap Scheerens. Source: J. Scheerens, *School, teaching, and system effectiveness: some comments on three state-of-the-art reviews*. “School Effectiveness and School Improvement”, 25:2, 2014, p. 284.

As a result, both theoretical and empirical approaches have been strengthened by the implementation of successful projects around the world, as well as by interventions and innovations introduced to education systems in different countries on how to help schools create an effective learning environment for all their pupils. Also, this expansion of knowledge makes use of well-established ideas on how to make a school unit highly effective in introducing conditions and strategies at the level of the entire system in a given country, province or county.

When reviewing research findings and convincing evidence on how to introduce large-scale school reform, the current conceptual framework for education policies implemented by PISA top countries is worth scrutinising. Effective implementations and successful reforms reveal how many countries have been able to make use of the “wealth of science” in their native contexts. It is surprising that the efforts to systematically improve schools remain invisible or elusive in most countries. It wakes up reflections on failed reforms that have been present in the collective consciousness since the 1960s. The results in the PISA study collected since 2000, indicate that the already collected knowledge on effectiveness and improvement in education is predominantly ignored, and few efforts are being made to adapt new achievements to the contexts of particular national education systems. In many cases, these tendencies intertwine and reformers make use of both resources to no avail or, at best, achieve only partial benefits. This attests to the power of mythical thinking in education and how the thinking is anchored in culture. Reformers seem to arrive at false assumptions, which

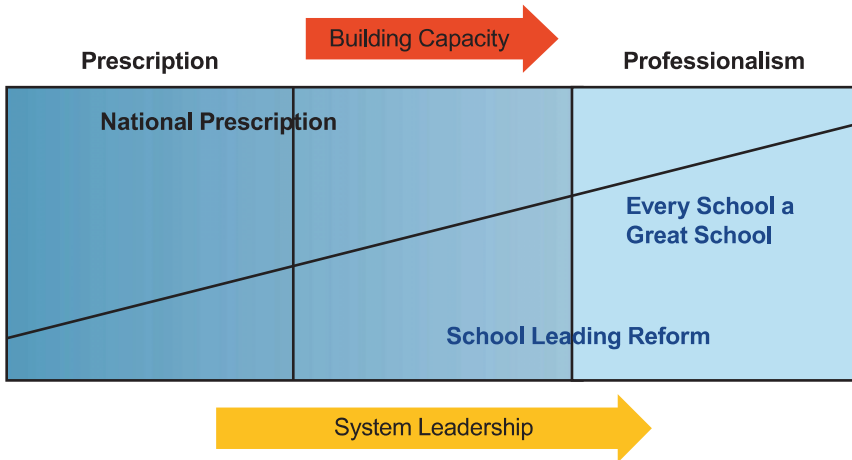


Fig. 1. Towards a system of wide sustainable reforms. Source: D. Hopkins, A. Harris, L. Stoll, T. Macka, *School and System Improvement: State of the Art Review*. “School Effectiveness and School Improvement”, 2 (25), 2014. Keynote presentation prepared for the 24th International Congress of School Effectiveness and School Improvement, Limassol, Cyprus, 6 January 2011.

surprise with the strength of argumentation accepted by the majority of society, including teachers. This proves to what extent mythical thinking rejects scientific achievements. Therefore, educational policy does not seem to remain indifferent to myths. Their prevalence may also testify to the stubborn, irrational pervasiveness of erroneous assumptions, which Kwieciński calls the “boomerang effect”<sup>28</sup>.

Myths also surface in debates around the quality of teaching and the impact of external accountability. They are also present in more detailed discussions at school or class level, in decisions about class sizes, school grades, or discipline and the effectiveness of rewards and punishments. Therefore, myths permeate the educational space at macro, meso and micro-levels of resolution and decision-making<sup>29</sup>. It can be concluded that the mythical “seduction” present in the decisions of educational authorities at the macro-level can be the most influential. The arguments of the introduced reforms are of significant strategic importance at this level. Zbigniew Kwieciński emphasises that they influence the choice of concepts and content, but also the adopted structure, scope and pace of the implemented changes, as well as methods of controlling the implemented

28 See: Z. Kwieciński, *O warunkach koniecznych i zagrożeniach reformy systemu edukacji*, [in:] idem, *Tropy – ślady – próby: studia i szkice z pedagogii pogranicza*, Edytor, Poznań-Olsztyn 2000, pp. 365–372.

29 B. Śliwerski, *O mitach szkolnej edukacji*. Available at: <https://sliwerski-pedagog.blogspot.com/2018/03/o-mitach-szkolnej-edukacji.html> (access: 20.03.2019).

intervention, the adopted criteria for assessing effects, both staged and comprehensive, in the orientation towards social functions in the state<sup>30</sup>.

The chapter is meant to review universal myths that are present in education independently of the context of particular countries. The diagnosis takes into account the results of international research and analyses political assumptions for the planned and implemented reforms. It also looks at universally accepted arguments which block and prevent the development of education towards achieving a high-class status and exposes numerous false assumptions that can get in the way of educational improvement<sup>31</sup>. Due to their false premise but with features of “universality”, these arguments may be identified as myths and analysed from this perspective<sup>32</sup>.

The adopted approach assumes that the use of myths in the process of decision-making poses a threat to the quality of education at the macro-level (headquarters), at the meso-level (intermediate), as well as at the micro-level (school and class). These erroneous assumptions are then perpetuated and reinforced at each level and doom other, perhaps correct interventions, to failure.

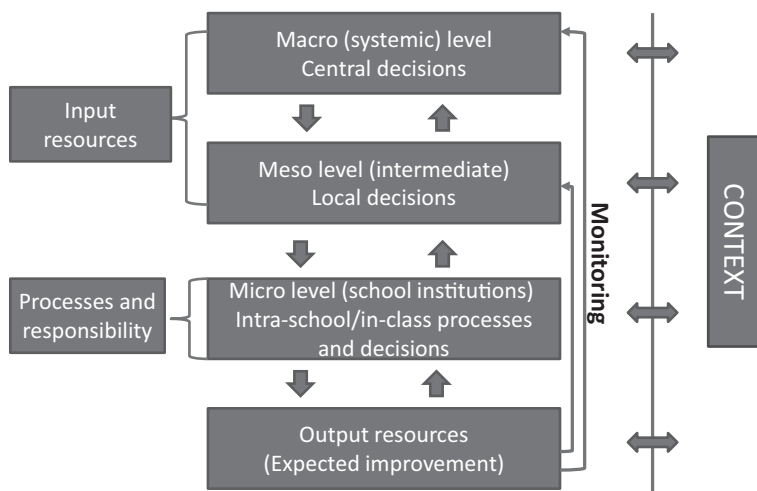


Fig. 2. A management model focused on the quality and effectiveness of education. Source: Own study.

At the macro level, political decisions are expressed in planned and implemented educational reforms, whereas at the micro level they concern the school’s mission

30 Z. Kwieciński, *Socjopatologia edukacji...*, p. 67.

31 See: A. Schleicher, *Edukacja światowej klasy. Jak kształtować systemy szkolne na miarę XXI wieku*, Evidence Institute–Związek Nauczycielstwa Polskiego, Warszawa 2019, p. 51.

32 See: M. Golka, op. cit., p. 41; J. Campbell, op. cit.; A. Siewierska-Chmaj, *Mity w polityce: funkcje i mechanizmy aktualizacji*, ASPRA, Warszawa 2016.

and curriculum (in decentralised systems) and constitute the area of school micropolitics. Even though the scale of “destruction” is of a different range, myths which infuse educational decisions constitute threats to pupils at the micro level. All the more, the prerequisite to unmask myths and “disenchant” their power becomes a priority.

It is surprising that the power of myths is not in the decline, as research results from around the world in different countries and at different times reveal their indifference to time and socio-political/economic contexts. It is therefore worth taking a closer look at older and newer studies in order to answer several questions:

1. Have there been any myths, and if so, what myths have there been present in education policies?
2. Which aspects of the orientation towards quality and effectiveness in education are rejected in myths?
3. In which aspects do myths show their greatest strength (are the most numerous)?

In response to the questions, an overview of research conducted in Poland from the 1970s to the present day was made, with focus on unmasking myths. Educational policies in their national conditions were compared to international research conducted in the world in recent years.

It is worth remembering that false assumptions made by decision makers are recognisable in objective processes and their effects taking place within school space (diagnoses of educational reality). They are equally visible in educational documents of various ranks that are meant to lay foundations for these processes. The reform of education initiated by educational decision makers, built on the foundation of myths, is a kind of “verdict” on educational practices, because in its origin, content and structure, it is irrational, pre-logical, and fails to comply to reality<sup>33</sup>. It emerges from wrongly accepted premises:

“incorrect diagnoses, wrongly formulated goals and inadequately selected means (in relation to social needs and claims). There is, therefore, a process of isodeception at play, i.e. mutual, semi-conscious self-deception, with a more or less complete ‘veil of ignorance’ as to its psychological mechanisms and social consequences”<sup>34</sup>.

The myths within the education system, demonstrated and developed by Zbigniew Kwieciński, Tadeusz Pilch and Bogusław Śliwerski, reveal that reformers’ myths and illusions can be scrutinised through many prisms, such as the prism of effects in everyday school life (Kwieciński), the prism of main as-

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33 Ibidem, p. 69.

34 Ibidem.

Types of illusions, myths and erroneous axioms in reforming education in Poland			
<p>Zbigniew Kwieciński</p> <ul style="list-style-type: none"> <li>- Exogenous delusions</li> <li>- Superstructure, culture (including education) is a base function</li> <li>- The myth of the only right way</li> <li>- The myth of a stable, linear development path</li> <li>- The myth of dialogue between generations – a relay race of generations</li> <li>- The myth of the torch, education and activities for the objective interest of people, regardless of their awareness and will</li> <li>- The myth that knowledge is objective and certain – it must be conveyed efficiently</li> <li>- Endogenous illusions as to the essence of the educational function</li> <li>- The myth of solarisation being identical with development and socialisation</li> <li>- The myth of schools introducing young people to culture and history</li> </ul>	<p>Tadeusz Piłch</p> <ul style="list-style-type: none"> <li>- The illusion of creating a universal index of values for the world education system above divisions and ideology</li> <li>- The myth of universal education – there are barriers and threats to access education for disadvantaged communities</li> <li>- The myth of an equal start – analysed in the aspect of kindergartens, extracurricular and out-of-school education, commercialization of education as well as teachers and counseling, material conditions of education</li> <li>- The myth of the educational function of the school (dominance of the teaching function, pragmatic school over the educational function)</li> <li>- The myth of a single curricular offer</li> </ul>	<p>Tadeusz Lewowicki</p> <p>He points to various types of rationality and reveals the different illusions of educational reforms through their prism:</p> <ul style="list-style-type: none"> <li>- scientific rationality (the actions taken are part of a chain of changes for the better)</li> <li>- emancipatory rationality (as promoting freedom in creating content, methods, means, forms – used in an irresponsible, irrational way)</li> <li>- critical, hermeneutic, critical-creative rationality (it is difficult to demonstrate clear reform programs on such grounds and even more difficult to demonstrate successful implementations)</li> <li>- pragmatic rationality (quasi-reforms aimed at acquiring certain, mainly instrumental, skills)</li> </ul>	<p>Bogusław Śliwowski</p> <p>Illusions and negative effects of reforms are shown in the perspectives of typical strategies for managing and reforming education in the last quarter of the last century:</p> <ul style="list-style-type: none"> <li>- aggressive strategy</li> <li>- conservative strategy</li> <li>- strategy of centralist reforms</li> <li>- defensive strategy</li> </ul>

*(Continued)*

Types of illusions, myths and erroneous axioms in reforming education in Poland			
Zbigniew Kwiecieński	Tadeusz Piłch	Tadeusz Lewowicki	Bogusław Śliwowski
<ul style="list-style-type: none"> <li>- The myth of illusion of promotion and social mobility through school</li> <li>- The myth of leaving the countryside and peasant agriculture being liberating</li> <li>- The myth of schools bringing children up</li> <li>- The myth of intensive work is in progress at school</li> <li>- The myth of teachers effectively communicating the goals and principles of the system to young people</li> <li>- The myth of education enhancing loyalty</li> <li>- The myth of young people perceiving the world “properly”</li> <li>- The myth of school being separate from politics</li> <li>- <b>Illusions about planned educational changes</b></li> <li>- The myth of radical change</li> <li>- The myth of educational autonomy</li> </ul>	<ul style="list-style-type: none"> <li>- The reform myth (the illusion of profound changes as a result of the reform)</li> <li>- The myth of quick reforms (education system will not change quickly, i.e. in-depth changes need more time)</li> </ul>	<ul style="list-style-type: none"> <li>- rationality of resignation, helplessness, sense of being lost, even fear (reforms do not inspire hope and thus, there is no commitment to implementation)</li> </ul>	

*(Continued)*

Types of illusions, myths and erroneous axioms in reforming education in Poland			
	Tadeusz Piłch	Tadeusz Lewowicki	Bogusław Śliwerski
Zbigniew Kwieciński			
<ul style="list-style-type: none"> <li>- The myth of perpetration</li> <li>- The myth of processes and educational paths being freely controlled</li> <li>- The myth of organisational changes in education bringing quick and positive results</li> <li>- The myth of working methods and techniques being the most important at school</li> <li>- The myth of the importance of changing names and rituals</li> <li>- The myth of deprivation and necessary rehabilitation</li> <li>- The myth of separation between the reformer and expert roles</li> </ul>			

Table 2. Types of illusions, myths and erroneous axioms in education reforms in Poland. Source: Own elaboration based on: Z. Kwieciński, *Socjopatologia edukacji*, Mazurska Wszechnica Nauczycielska, Olecko 1995, pp. 70–85; T. Piłch, *Spory o szkołę*, Żak, Warszawa 1999; T. Lewowicki, *Przemiany oświaty*, Żak, Warszawa 1994; B. Śliwerski, *Edukacja (w) polityce. Polityka (w) edukacji. Inspiracje do badań polityki oświatowej*, Impuls, Kraków 2015.

sumptions in the education system, i. e. what is meant to be achieved (Pilch), the prism of different rationalities showing different illusions of educational reforms (Lewowicki), or illusions and their negative effects from the perspective of typical strategies employed in managing and reforming education in the last quarter of the last century. Interestingly, despite the passage of years and the development of research focused on quality and effectiveness in education, as well as after a comprehensive reform aimed at strengthening schools in achieving improvement, the myths demonstrated by Polish researchers reveal a surprising convergence. The findings reveal the unchanging mechanisms in the minds of educational decision makers who shape everyday school life in various political systems and periods of Polish education. Also, despite the analyses being created in long intervals, the conclusions remain unchanged.

Kwieciński unmasked some hidden aspects of the educational paradigm that was present in Poland for twenty years of the centralised system. His presented descriptions and explanations of the prevailing beliefs and assumptions are a document of the phenomena and processes of the 1970s and 1980s, on the one hand, and on the other hand, they reveal the power of myths, as most of them are still valid. Also, the analyses of reformers' illusions of the transformation period and later times (Śliwerski) surprise with their durability and invariability of the adopted assumptions.

## Mythical thinking in education reforms in the world

The overlapping of myths presented by Polish researchers with results of studies in other countries is an interesting phenomenon. The analysis conducted by Jay P. Greene<sup>35</sup> surprises with its detection of many similarities and overlapping myths revealed at a later time in international studies conducted by other scientists. In a surprising number of respects, the myths show similarities in the school systems of Poland and the United States, as well as in school systems of other countries participating in the PISA study.

Researchers expose erroneous assumptions made by the reformers of state schooling. Greene collected evidence showing in what education decision makers believe, as well as what beliefs underlie their policies when aiming at improved effectiveness in education. To this end, he pointed out and examined eighteen myths perpetuated within dominant interest groups<sup>36</sup>. In addition, when de-

35 J. P. Greene, *Education Myths: What Special Interest Groups Want You To Believe About Our Schools – And Why it Isn't So*, Rowman & Littlefield, Lanham 2005.

36 See: Z. Melosik, *Współczesne amerykańskie spory edukacyjne. Między socjologią edukacji a pedagogiką postmodernistyczną*, Wydawnictwo Naukowe UAM w Poznaniu, Poznań 1994; E.

bunking these 18 myths, Greene emphasises that they are all part of a single “mega-myth”, i. e. that “(...) education policies differ from other policies in this that the types of incentives which normally shape human behaviour fail to shape educational behaviour”<sup>37</sup>. He means that positive or negative reinforcement, which works in the case of parenthood, but also in business institutions, fails to work in education. Thus, by presenting arguments, he calls for rational thinking in economic terms.

Also, Greene groups the eighteen seductive assumptions about education, which are false and block promising reforms, into four categories related to: resources, performance, accountability, and choice. Interestingly, many of them are widely accepted not only by politicians, but also by the teaching community, their trade unions, as well as by average citizens.

An explanation of the failures of educational reforms carried out on the basis of myths can be found in many other studies<sup>38</sup>. I would like to highlight here two of the more recent ones that refer to the overall effectiveness of educational reforms undertaken in the world after 2000, i. e.: findings published by Jay P. Greene in 2005 and by David Hopkins in 2013: *Exploding the Myths of School Reform*<sup>39</sup>, as well as by Andreas Schleicher: *World-class Education. How to Shape Education for the 21st Century*<sup>40</sup> in 2018.

Despite the unveiling of myths in such different countries and school systems, many of them point to similar mechanisms and the majority of them are still valid. This shows both the power of mythical thinking and its anchoring in culture. The prevalence of some of the myths may indicate boomerang effects, i. e. stubborn, irrational “fixation” on incorrect assumptions<sup>41</sup>.

All of the authors selected in the study, i. e. Greene, Hopkins and Schleicher, believe that the failure of many educational reforms that were supposed to affect the effectiveness and improvement of teaching and learning processes, resulted

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Potulicka, *Neoliberalne reformy edukacji w Stanach Zjednoczonych. Od Ronalda Reagana do Baracka Obamy*, Impuls, Kraków 2014.

37 J. P. Greene, op. cit., p. 218.

38 P. Downs, *Myths and Misinformation In School Reform*; P. Downs, *Schoolhouse Shams*, R&L Education, Lanham 2012; M. Leonhardt, *The Seven Toxic Reading Myths that are Killing School Reform*. Kindle Edition, 2012; J. Tagg, *The Instruction Myth: Why Higher Education is Hard to Change, and How to Change It*, Rutgers University Press, New Brunswick 2019; D. C. Berliner, G. V. Glass, *50 Myths and Lies That Threaten America’s Public Schools: The Real Crisis in Education*, Teachers College Press, New York 2014; A. Sahin, M. J. Mohr-Schroeder (eds.), *STEM education 2.0. Myths and truths: What did 10 years of STEM education research in K12 teach us?* Leiden 2019.

39 D. Hopkins, *Exploding the Myths of School Reform*, Open University Press, McGraw Hill Education, Berkshire and ACER Press, Melbourne 2013.

40 A. Schleicher, *World class: how to build a 21st-century school system*, OECD Publishing, Paris 2018.

41 See: Z. Kwieciński, op. cit., pp. 365–372.

Myths in educational reforms		
<p style="text-align: center;">Jay P. Greene 2005)</p> <p><b>– Resources</b></p> <ul style="list-style-type: none"> <li>– The Money Myth – “Schools are doing poorly because they need more money”.</li> <li>– The Myth About the Impact of Special Education Programs – “Special education programs burden public schools, inhibiting student achievement”.</li> <li>– The myth of helplessness – “Social problems like poverty are conditioned by poor student achievement and schools lack preventive measures”.</li> <li>– The Class Size Myth – “Small classes improve student achievement”.</li> <li>– The Qualification Myth – “Teachers with high qualifications or more experience are much more effective”.</li> <li>– The Low Pay Myth – “Teachers are underpaid”.</li> <li>– <b>Outcomes</b></li> <li>– The Fall Myth – “Schools do far worse than they used to”.</li> <li>– Passing Myth – “Almost all students graduate from high school”.</li> <li>– The myth of the barrier that makes it impossible to study – “Extracurricular barriers prevent students from national minorities from entering studies”.</li> </ul>	<p style="text-align: center;">David Hopkins (2013)</p> <ol style="list-style-type: none"> <li>1. <b>Myth:</b> High achievements of some students cannot apply to all students</li> <li>2. <b>Myth:</b> There is school autonomy</li> <li>3. <b>Myth:</b> Poverty determines students’ achievements and efficiency</li> <li>4. <b>Myth:</b> The curriculum is more important than the learning process itself</li> <li>5. <b>Myth:</b> Teaching is either art or science</li> <li>6. <b>Myth:</b> Responsibility before external bodies results in a consistent reform of the school</li> <li>7. <b>Myth:</b> Innovation and network creation enriches the school reform</li> <li>8. <b>Myth:</b> Charismatic leadership enriches the school reform</li> <li>9. <b>Myth:</b> approach: One measure for all during the implementation of school reforms</li> <li>10. <b>Myth:</b> Market forces drive educational perfection</li> </ol>	<p style="text-align: center;">Andreas Schleicher (2018)</p> <ol style="list-style-type: none"> <li>1. <b>Myth:</b> Poorer students will always be worse at school; you can’t get away from deprivation</li> <li>2. <b>Myth:</b> Immigrants reduce the general results of schools</li> <li>3. <b>Myth:</b> Higher expenses are the key to success</li> <li>4. <b>Myth:</b> The results are always better in smaller classes</li> <li>5. <b>Myth:</b> The longer the learning, the better the results</li> <li>6. <b>Myth:</b> Educational success depends mainly on the inherited abilities</li> <li>7. <b>Myth:</b> Some countries are doing better due to cultural conditions</li> <li>8. <b>Myth:</b> Only the best graduates can become teachers</li> <li>9. <b>Myth:</b> choosing students in terms of skills is a good way to improve outcomes</li> </ol>

(Continued)

Myths in educational reforms		
Jay P. Greene 2005)	David Hopkins (2013)	Andreas Schleicher (2018)
<ul style="list-style-type: none"> <li>- <b>Responsibility</b></li> <li>- The myth of exams – “The results of the so-called important exams (‘high stakes’) are unreliable: they are distorted by dishonesty and teaching ‘to the test’.”</li> <li>- The screening myth – “Final exams deprive many students of high school graduation.”</li> <li>- The myth of the burden imposed by external bodies – “External accountability systems place a significant burden on schools”.</li> <li>- <b>Choice</b></li> <li>- The myth of the ineffectiveness of the research – “The evidence for the effectiveness of educational vouchers in the conducted research is not clear”.</li> <li>- The Exeter myth – “Students from private schools pass the tests better because schools have more money and recruit ‘better’ students, while eliminating ‘weaker’ students”.</li> <li>- Drain myth – “Choosing a school is detrimental to public schools”.</li> <li>- The myth of barrier to admission of disabled students – “private schools do not accept students with disabilities”.</li> </ul>		

(Continued)

Myths in educational reforms		
Jay P. Greene 2005)	David Hopkins (2013)	Andreas Schleicher (2018)
<ul style="list-style-type: none"> <li>- The myth of democratic values – “Private schools are less effective in promoting tolerance and active citizenship”.</li> <li>- Selection myth – “Private schools practice racial selection to a greater extent than public schools”.</li> </ul>		

Table 3. Selected myths in educational reforms. Source: Own elaboration based on: J. P. Greene, *Education Myths: What Special Interest Groups Want You To Believe About Our Schools – And Why it Isn't* So Rowman & Littlefield, Lanham 2005, p. 267. D. Hopkins, *Exploding the Myths of School Reform*, Open University Press, McGraw Hill Education, Berkshire and ACER Press, Melbourne 2013; A. Schleicher, *World class: how to build a 21st-century school system*, OECD Publishing, Paris 2018.

from erroneous assumptions and actions based on myths related to school reform. Importantly, these erroneous assumptions (myths) are invariably common in thinking about education in most countries of the world. This difficult-to-accept conclusion is very clearly visible in the study by Andreas Schleicher, Director of Education of the OECD, who oversees the Program for International Student Assessment – PISA. When debunking and refuting the myths, the authors refer to the available data and often cite similar arguments, which makes it possible for me to present them all together.

1. The myth that achievement cannot be realised at scale for all students. This myth justifies the lack of improvement of a specific group of students as a factor independent of teachers and the school.
2. The myth of school autonomy. This myth is most often used in the trend towards decentralisation of school management. It assumes that greater autonomy leads to better outcomes.
3. The myth that poverty is a determinant of student and school performance. This is a myth that undermines both social justice and strategic considerations. It is based on a morally wrong assumption that poverty is a determinant of educational achievement. Schleicher's myth that it is immigrants who lower the overall results of schools also refers to the analysed area. This myth is the result of waves of immigrants experienced by many countries. In this case, the myth hides insufficient state aid in the education system.
4. The myth that it is the curriculum rather than the learning that counts. This myth questions the process of personalisation of the education process – striving to adapt education to individual needs, interests and talents<sup>42</sup>.
5. The myth that teaching is either an art or a science. This erroneous assumption separates what is two sides of the same coin. A reflective approach to teaching practice is the essence of the connection between art and teaching theories<sup>43</sup>.
6. The myth that external accountability results in sustained school reform. It is an assumption that the introduction of an external accountability policy will have a positive and lasting impact on student achievement and improvement in school performance.

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42 D. Miliband, *Personalised Learning: Building a New Relationship with Schools*, Department for Education and Skills, London 2004.

43 See the concept by Donald A. Schön in: D. A. Schön, *The reflective practitioner: How professionals think in action*, Basic Books, New York 1983; M. Czerepaniak-Walczak, *Aspekty i źródła profesjonalnej refleksji nauczyciela*, Edytor, Toruń 1997; H. Mizerek, *Dyskursy współczesnej edukacji nauczycielskiej: między tradycjonalizmem a ponowoczesnością*, Uniwersytet Warmińsko-Mazurski, Olsztyn 1999.

7. The myth that innovation and networking always add value to school reform. This myth propagates fleeting or popular ideas introduced in a superficial way. This is related to the transition from the information age to the innovation age that puts schools under pressure to shape innovative environments. It turns out that the effects of such activities have little impact on student achievement and are no longer relevant.
8. The myth of the contribution of charismatic leadership to school reform. Research conducted in recent decades has revealed the importance of shaping a culture of high expectations, which completely changes the leadership orientation towards ethical and team-focused leadership, i.e. distributed leadership accompanied by the phenomenon of “leadership sharing”<sup>44</sup>.
9. The myth that ‘one size fits all’ in implementing school reform. Verification of ready-made solutions, although well-intentioned, must be verified with professional precision, both with the level of school development (school system) and school context. Otherwise the planned interventions will have a limited impact on the effectiveness of teaching and learning<sup>45</sup>.
10. The myth that market forces drive educational excellence. Relying on market forces as a strategy for educational change inevitably distorts assumptions and replicates errors, and in such a process the effects speak out against the weakest and poorest students<sup>46</sup>.
11. The myth that higher expenses are key to success. The belief that higher investments in education will lead to a comparable increase in education has not been confirmed.
12. The myth that in smaller classes the results are always better. There is no evidence in the international context which confirms such a relationship.
13. The myth that the longer the study period, the better the results. The opposite relationship, i.e.: “countries where students spend more time studying in and out of school often score worse on PISA tests<sup>47</sup>” has been found the

44 B. Pont, D. Nusche, D. Hopkins, *Improving School Leadership, Volume 2: Case Studies on System leadership*, OECD Publishing, Paris 2008; B. Pont, D. Nusche, H. Moorman, *Improving School Leadership, Volume 1: Policy and Practice*, OECD Publishing, Paris 2008.

45 See: M. Fullan, A. Hargreaves, *Bringing the profession back in: Call to action*, Learning Forward, Oxford 2016; M. Fullan, *Choosing the Wrong Drivers for Whole System Reform*, Melbourne 2011; M. Mourshead, C. Chijioke, M. Barber, *How the World’s Most Improved School Systems Keep Getting Better*, McKinsey and Company, London 2010; D. Hopkins, *School Improvement for Real*, Routledge Falmer, London 2001; D. Hopkins, A. Harris, D. Jackson, *Understanding the school’s capacity for development: Growth states and strategies*, “School Leadership and Management”, 3 (17), 1997, pp. 401–411.

46 See: E. Potulicka, J. Rutkowiak, *Neoliberalne uwikłania edukacji*, Impuls, Kraków 2010.

47 A. Schleicher, op. cit., p. 62.

course the PISA assessment. This means that school effectiveness is decided by other factors.

14. The myth that educational success depends mainly on inherited abilities. PISA results highlight the effectiveness of socially supported high expectations and show evidence that students' confidence in the results of their hard work can help them succeed<sup>48</sup>.
15. The myth that some countries do better because of cultural conditions. Cultural heritage can be an asset, but it is not the only condition for success or even improvement.
16. The myth that only the best graduates can become teachers. This makes sense to a large extent, as the quality of the education system will not be higher than that of teachers.
17. The myth that matching students by skills is a good way to improve performance. The results of the PISA research deny the validity of this assumption and indicate that dividing students in terms of their abilities (profiling, marking paths, repeating grades) is not a feature of the world's leading education systems. Instead, the best systems provide their students with equal learning opportunities.

## A need to unmask myths – summary

Leszek Kołakowski notes that “at least in our culture, participation in a myth is an eternal challenge to reason”<sup>49</sup>. “Myths are particularly effective political tools, because they indisputably impose a certain way of thinking, thus they create not only patterns of social behaviour, but also foundations for the language of power”<sup>50</sup>. Ignorance or lack of interest in the determinants of the effectiveness of education and the ways of implementing reforms (change) are conducive to the existence of myths and are used in educational policies. Without scientific justifications, without substantive argumentation, they are taken for granted, quickly and easily legitimising the assumptions of the reforms.

1. The first challenge is to disclose the myths that are present in educational reforms, i. e. to unmask “conventional wisdom”. The stalemate can be overcome by taking the side of science and reason, i. e. by developing scientific research and by disseminating its findings, as well as by relying on scientific evidence, rather than on figments of imagination. At its core, it is a path through education, with a passion for a scientific scrutiny of the world and the surrounding reality. Those

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48 Ibidem, pp. 63–66.

49 L. Kołakowski, op. cit., p. 129.

50 A. Siewierska-Chmaj, *Mit polityczny jako...*, p. 12.

debunking the misconceptions of education reforms and dispelling myths anchored within societies by means of scientific evidence believe that public schools can be fixed. There is much to be gained by dispelling myths which lead to the opposite of what is expected, thus, blocking so many needed reforms. Although the path seems simple and involves the acceptance of important facts in the political arena<sup>51</sup>, it is surprising how many countries express concern about the condition of public education, and yet remain entangled in a world of appearances perpetrated by myths. It is interesting that according to Greene, myths as counterproductive reforming initiatives are typical only of education policies. In other areas of social and economic life, important financial decisions are made solely on the basis of expert claims which demand empirical evidence<sup>52</sup>. This situation is explained by Greene with experts' great financial and political interest, given that they specialise in the recommendations that they issue. What is more, we may assume that as long as such an approach is profitable, it will be perpetuated. Another regularity is pointed out by Tadeusz Biernat, who notes that the more the political system moves towards authoritarianism and totalitarianism, the more ready-made hierarchical norms, commands and prohibitions are inculcated in the society<sup>53</sup>. Therefore, a significant limitation of this practice, which unfortunately fails to eliminate myths altogether, is to cultivate a democratic culture, as well as reflection and decision-making based on scientific evidence. This direction may not guarantee success, but at least it creates a potential for success. Otherwise, decisions will be based on myths and there will be 100% disappointment and failure.

2. The second challenge is to practice evidence-based education policy. The approach is consistent with the assumption that educational decision makers will act more effectively when they have a broader and structured control knowledge of the functioning of the entire system<sup>54</sup>. A relevant database is provided by evidence-based educational research<sup>55</sup>. Johannes Bellmann and Thomas Müller describe this perspective as a hyper-technocratic control model that attempts to show empirical facts from an external perspective<sup>56</sup>. It is equally important to

51 See: E. A. Hanushek, *The Failure of Input-Based Schooling Policies*. “The Economic Journal”, 113, pp. F64-F98.

52 J. P. Greene, op. cit., p. 137.

53 T. Biernat, *Mit polityczny*, Państwowe Wydawnictwo Naukowe, Warszawa 1989, pp. 306–308.

54 H. Altrichter, M. Heinrich, *Evaluation als Steuerungsinstrument im Rahmen eines “neuen Steuerungsmodells” im Schulwesen*, [in:] *Evaluation im Bildungswesen. Eine Einführung in Grundlagen und Praxisbeispiele*, (eds.) W. Böttcher, H. G. Holtappels, M. Brohm, Juventa, Weinheim-München 2006, pp. 51–64.

55 Ibidem, p. 55.

56 J. Bellmann, T. Müller, *Evidenzbasierte Pädagogik – ein Déjà-vu?*, [in:] *Wissen was wirkt – Kritik evidenzbasierter Pädagogik*, (eds.) J. Bellmann, T. Müller, VS Verlag für Sozialwissenschaften, Wiesbaden 2011, p. 10.

provide control knowledge about educational processes that are crucial for the functioning of the system, as well as to improve the transfer of scientific knowledge to educational policy and practice<sup>57</sup>. The approach fits into the context of evidence-based policy, the basic assumptions of which are described by Dederling in four general stages: (1) the actors of the educational system receive reliable knowledge, (2) the obtained information is professionally accepted, properly processed and interpreted by actors/decision makers, (3) the process of data acquisition and processing results in decisions adequate to the existing problems, (4) on the basis of the decisions, such measures are developed and implemented that should lead to an improvement in the quality of education<sup>58</sup>.

3. The third challenge is to monitor education and educational reforms. As a result of such monitoring activities, institutional educational processes become transparent and can form a basis for social discussion and deliberate political decisions. Overall, education monitoring can make education policy more legitimate and goal-oriented. Information obtained as a result of such scrutiny registers a wide spectrum of data, from educational requirements, through educational paths, to learning outcomes. The collected information is most often combined with the qualitative characteristics of a given institution in order to create space for “interaction” between organisational and personal conditions. Some of the obtained information is ultimately concentrated in the form of indicators which are located at the level of the education system or within individual areas of education, or on certain levels within the structure of the system. In this perspective, educational monitoring is systemic<sup>59</sup>. It supports decision makers as well as the society in terms of possible interventions. It provides key data not only on institutional education, but more broadly, it enables a broader view of the potential of a given society.

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57 R. Tippelt, J. Reich-Claasen, *Stichwort “Evidenzbasierung”*, “DIE – Zeitschrift für Erwachsenenbildung”, 4, 2010, p. 22.

58 K. Dederling, *Entscheidungsfindung in Bildungspolitik und Bildungsverwaltung*, [in:] *Handbuch Neue Steuerung im Schulsystem (Educational Governance)*, (eds.) H. Altrichter, K. Maag Merki, vol. 7, Wiesbaden 2010, p. 65.

59 H. Döbert, H. Weishaupt, *Bildungsmonitoring*, [in:] *Schul- und Unterrichtsreform durch ergebnisorientierte Steuerung. Empirische Befunde und forschungsmethodische Implikationen*, (eds.) A. Wacker, U. Maier, J. Wissinger, Springer VS Verlag für Sozialwissenschaften, Wiesbaden 2012, pp. 155–173.



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## Chapter 2.

# Educational policy and doctoral students in Poland.

### Idea and reality

## Introduction

Obtaining a doctorate is a landmark in young people's academic and socio-professional careers. A doctorate is "a pinnacle of academic achievement (...). It connotes mastery of a discipline area, confidence and agility in the making and reporting of new knowledge in a particular field, and "know-how" in the construction of a sustained argument"<sup>60</sup>. There is no doubt that the doctorate as a degree has a high status and is "universally recognised"<sup>61</sup>. The doctorate is often referred to as the gateway to independent scientific work<sup>62</sup>, and in the process of earning it, a doctoral student gradually becomes an independent researcher. In this way, his or her professional identity is formed, which is a process of development "from a layman to an insider"<sup>63</sup>. In doing so, it is worth noting that two mechanisms take place in the process of identity acquisition. The first refers "to the identity and appellation of an individual's position and status in society". The second points to the current state and "refers to the identity of being similar to or different from others"<sup>64</sup>. So, to be a doctoral student is to be someone chosen, special, who has a higher status due to the mere fact of entering the role of a young scientist. On the other hand, there is the process of creating a similar community but also of setting the boundaries of an individual's identity both in relation to people outside that community and within it. Keefer uses the concept of doctoral liminality in this context, although it is also possible to integrate different

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60 S. Parry, *Disciplines and Doctorates*, Springer, Dordrecht 2007, p. 3.

61 *Ibidem*, p. 4.

62 V. Trafford, S. Leshem, *Doctorateness as a threshold concept*. "Innovations in Education and Teaching International", 46 (3), 2009, pp. 305–316.

63 J-l. Zhao, F. Chen, X-M. Jia, The Development and Validation of the Doctoral Student Identity Scale. "Frontiers in Psychology", 12, 2021, p. 3.

64 *Ibidem*.

identities at a given point in the biography<sup>65</sup>. In turn, structured academic (doctoral) studies leading to a PhD contribute to:

“the personal development, ‘increased confidence/self-confidence’, ‘self-fulfilment’ and ‘challenge’; ‘new ways of thinking’ and ‘being reflective and analytic’; and ‘knowing how to write (...) trust in abilities’ and ‘confidence in knowledge’; ‘focus’, ‘self-discipline’ and ‘emotional growth(...) the ‘joy of study’, broader horizons, rich life experience’; and an altruistic sense of making a contribution and becoming a better, more critical professional<sup>66</sup>”.

Moreover, doctoral students are required to create “new ideas and knowledge upon which future educational activities can be built, sustained and nourished<sup>67</sup>”. And yet, often the writing of a doctoral thesis, regardless of the form of the promoter, is described as a “solitary journey”, “accomplished through the socially (and often physically) isolated context of field research, experiences and celebrates a personal rite of passage<sup>68</sup>”. At the same time, the period of doctoral studies is a transitional phase in which new roles and identities are formed<sup>69</sup>. This is accompanied by processes of far-reaching individualisation of identity-related to disciplinary and field distinctiveness, but also by mechanisms of competitiveness typical of this environment, which contradict the idea of community. The process of writing a doctorate is supervised by a research supervisor (a promoter or promoters and sometimes an assistant promoter). This often involves co-creating the concept of the thesis, negotiating the final shape of the thesis, or even the promoter imposing a vision for the doctorate. The relationship with the promoter(s), across its entire spectrum – from democratic to very authoritarian – is essential for the doctoral student’s motivation and success, especially for his or her autonomy and academic freedom.

An important element in the formation of a doctoral student’s identity in an institutional context is academic socialisation, also known as doctoral student enculturation, which has “fundamental to the inter-generational transmission of disciplinary cultures within the academy<sup>70</sup>” and the ways of doing science.

65 J. M. Keefer, *Experiencing doctoral liminality as a conceptual threshold and how supervisors can use it*. “Innovations in Education and Teaching International”, 52 (1), 2015, pp. 17–28.

66 D. Leonard, R. Becker, K. Coate, *To prove myself at the highest level: The benefits of doctoral study*. “Higher Education Research and Development”, 24 (2), 2005, p. 141.

67 H. Davis, T. Evans, V. Carke, *A knowledge-based economy landscape: Implications for tertiary education and research training in Australia*. “Journal of Higher Education Policy and Management”, 28 (3), 2006, p. 236.

68 S. Delamont, P. Atkinson, O. Parry, *Critical mass and doctoral research: Reflections on the Harris Report*. “Studies in Higher Education”, 22 (3), 1997, p. 327.

69 S. Leshem, *Identity formations of doctoral students on the route to achieving their doctorate*. “Issues in Educational Research”, 30 (1), 2020.

70 S. Delamont, P. Atkinson, O. Parry, *Critical mass and Pedagogic Continuity: studies in academic habitus*. “British Journal of Sociology of Education”, 18 (4), 1997, p. 533.

According to Delamont, Atkinson and Parry:

“Scientific labs, research groups, core sets and collaborative networks share and transmit common stocks of knowledge (...) They share common rhetorics, persuasive techniques and representational conventions; they compete in the same marketplaces and share common interests; personnel, papers and other artefacts circulate among them<sup>71</sup>”.

Doctoral students are thus, according to these authors, socialised into the academic culture and habitus of the discipline, and the transmission from one generation to the next of typical identifications with the discipline’s problem field, along with methodologies and theories specific to the discipline, forms the basis of this process. Of course, it should be noted that, as Delamont (et al.) write, the model of a research school typical of the natural sciences and sciences, which is team-oriented, differs from the traditional model that exists in the social sciences, which is based on the idea of a lone scientist and his supervisor<sup>72</sup>.

In addition, autonomy and the development of exploration are important elements in the process of becoming a young scientist. Doctoral students must also learn to function in the complex structure of scientific life: not only within a scientific discipline but also within a department/chair, faculty and university<sup>73</sup>. Golde distinguishes four socialisation challenges here: 1) achieving intellectual mastery through the acquisition of intellectual competence; 2) fitting in with the realities of graduate life and surviving; 3) clarifying career choice related to the choice of professional path, and 4) achieving integration with the faculty, work-life harmony<sup>74</sup>.

Developing an identity as an independent professional scientist and researcher is crucial for the doctoral student. However, it should be noted that the role of a doctoral student is not always the only one that a doctoral student takes on at this stage of life. Indeed, he or she typically also has family and other professional commitments. This leads him or her to live in multiple, sometimes parallel, sometimes overlapping, and sometimes contradictory worlds, which, of course, complicates their academic situation.

Some authors draw attention here to the impact of doctoral students’ perceptions of the relationship between their future careers and their current doc-

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71 Ibidem, p. 536.

72 Ibidem, p. 537.

73 M. Jones, *Issues in doctoral studies – forty years of journal discussion: Where have we been and where are we going?* “International Journal of Doctoral Studies”, 8, 2013, p. 93.

74 Citation after: M. Jones, *Issues in doctoral studies – forty years of journal discussion: Where have we been and where are we going?* “International Journal of Doctoral Studies”, 8, 2013, p. 94.

toral status<sup>75</sup>. Sometimes a PhD is just a status symbol, and the holder does not intend to pursue an academic career; in many cases, however, such a career is his or her ultimate goal. According to Leshem, it is necessary to pay attention to the vulnerability that exists in many doctoral students regarding their own personal wellbeing, and sometimes the conflict “between identity and expectations,” stress, and “being stuck” resulting from the inability to make progress in writing a doctorate<sup>76</sup>. Leshem also talks about experiencing “uncertainty about the identity of self and purpose” and “liminality”<sup>77</sup>. This is because the process of writing a doctorate is complex and uncertain. It is often argued that the act of conferring the doctoral degree and the path to obtaining it constitutes a kind of rite of passage.

It is worth referring here to Baker’s stage model of doctoral education, which indicates the development of the identity of doctoral students in three stages of academic biography: Stage 1. “knowledge consumption” involving the admission process and first-year coursework; Stage 2. “knowledge creation” involving coursework completion and advancement to candidacy; and Stage 3. “knowledge enactment” involving dissertation defence<sup>78</sup>. Discussing this theory, Xing Ja-Xu and M. Hjalmarson noted that during Stage 2, doctoral students “go through a process of dual identity development that needs them to grasp the student identity while also accepting and enacting their researcher identity”<sup>79</sup>. In the third stage, on the other hand, doctoral students “also go through a parallel identity development process that requires them to learn how to be a researcher and a professional community member, as well as apply their knowledge to manoeuvre the processes of dissertation completion and job hunting”<sup>80</sup>.

On the other hand, in recent decades, one can see significant changes in the perception of doctoral education and the process of writing a doctoral thesis. From my perspective, there has been a shift from a paternalistic-protective formula to a neoliberal-competitive formula. We can even speak here of a “paradigm shift” related to the requirements to possess new competencies relating to the

75 See: H. Horta, *PhD students’ self-perception of skills and career plans while in doctoral programs: are they associated?* “Asia Pacific Education Review”, 19 (2), 2018, pp. 211–228; F. Huang, W. Shen, *What Determinants Affect Doctoral Students’ Career Plans? Main Findings from a 2018 Survey of Chinese Doctoral Students*. “International Journal of Chinese Education”, 8 (2), 2019, pp. 99–116.

76 S. Leshem, *Identity formations of doctoral students on the route to achieving their doctorate*. “Issues in Educational Research”, 30 (1), 2020, p. 170.

77 Ibidem.

78 X.-Y. Xu, M. A. Hjalmarson, *Education doctoral students’ self-study of their identity development: A thematic review*. “International Journal of Doctoral Studies”, 17, 2022, pp. 201–225.

79 Ibidem.

80 Ibidem.

latter formula, “research skills, ethics, professional abilities, and cultural and collaborative capabilities”<sup>81</sup>. The new type of doctoral student requires competencies that combine the traditional role of a researcher seeking knowledge and truth with an orientation toward rapid success, the essence of which is to publish the results of his/her research in prestigious (in Poland, high-scoring) journals, to function in the role of a participant in global world science, oriented to disseminate the results of his research and often to apply them both in academia, the economy, and the business world<sup>82</sup>. The consequence of these transformations is a move away from the master-to-apprentice model and toward “a structured learning process that takes place within a series of learning communities that operate at multiple levels inside and outside the university”<sup>83</sup>.

It is imperative to note that in a global world, the university is also subject to reforms stemming from the belief that knowledge is the essential resource of any country, the economy is knowledge-based, and scientists at every level of their careers must be reactive and adaptive to societal needs. There is no doubt, therefore, that doctoral education is embedded in a broader philosophy of economic growth and the “economisation” of universities and science. Less Bell and Howard Stevenson write that educational policy, whether its source is decisions and regulations at the state, national, local or supranational level, “therefore has a considerable impact on shaping what happens on a daily basis in schools and colleges, and the lived experiences of those who study and work in those establishments”<sup>84</sup>. The same authors cite after Taylor three aspects of this policy: context, text and consequences<sup>85</sup>.

“Context – refers to the antecedents and pressures leading to the development of a specific policy. This requires an analysis of the economic, social and political factors that give rise to an issue emerging on the policy agenda”<sup>86</sup>. In turn, text:

“broadly refers to the content of the policy itself. How is the policy articulated and framed? What does the policy aim to do? What are the values contained within the policy? Are these explicit, or implicit? Does the policy require action, if so what and by whom?”<sup>87</sup>.

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81 Ibidem.

82 See also: M. Nerad, *Conceptual Approaches to Doctoral Education: A Community of Practice*. “Alternation”, 19 (2), 2012, p. 58. Available at: [https://unike.au.dk/fileadmin/www.unike.au.dk/Publications/Nerad\\_Maresi\\_Conceptual\\_Approaches\\_to\\_Doctoral\\_Education.pdf](https://unike.au.dk/fileadmin/www.unike.au.dk/Publications/Nerad_Maresi_Conceptual_Approaches_to_Doctoral_Education.pdf), (access: 22.06.2023).

83 Ibidem, pp. 57–58.

84 L. Bell, H. Stevenson, *Education policy. Process, themes and impact*, Routledge, London-New York 2006, p. 8.

85 Ibidem, p. 12.

86 Ibidem.

87 Ibidem.

In the end – consequences:

“if policy texts are open to differing interpretations by practitioners, then this is also likely to result in differences in implementation. Such differences will then be magnified as the unique conditions prevailing in each institution further shape the implementation of the policy. Distortions and gaps appear in the implementation process, resulting in what is best described as ‘policy refraction’”<sup>88</sup>.

Furthermore, it is worth recalling, following the same authors, the views of Kogan, who identified four key values that underpin and inform educational policy – educational, social, economic and institutional values<sup>89</sup>. Moreover, it is into these that the doctoral student, the studies and his doctorate fit.

## Legal and formal changes in doctoral training in Poland

It is also necessary to refer here to the phenomenon of legal interference in the educational reality and identity of the doctoral student. This is how Jack M. Balkin writes about it, in the broad context of social life “law is continuously proliferating truth into the world. It is making things real”, and also, “it is making things true and false”<sup>90</sup>. Balkin goes on to write: “Law has power because it can make things true or false in ways that matter to us; conversely, law can make things true or false in ways that matter to us because it has power over us”<sup>91</sup>. At the same time, as Balkin notes, the law “reorganize, and even displace existing forms of social understanding, social practice, and social reality”<sup>92</sup>. Thus, any change in the law relating to doctoral students always changes the reality in which they live and their ways of thinking, even if they do not accept the change. They have to adapt to it, because if they refuse, they face sanctions, the most important of which is being deprived of the opportunity to complete their doctorate. The educational law of doctoral education structures and restructures their daily lives, biographies, as well as their ways of thinking and identity.

It should be added that higher education remains in a reciprocal, complex relationship with politics, the economy and social change. The dynamics of regulating access to university education (including tertiary education and doctoral training) as well as its shape and form, remain the responsibility of each country’s education policy. One of the essential contexts of this policy is the

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88 Ibidem.

89 M. Kogan, *Educational policy-making: A study on interest groups and parliament*, Routledge, London 1975.

90 J. M. Balkin, *The Proliferation of Legal Truth*. “Harvard Journal of Law and Public Policy”, 26 (1), 2003, p. 103.

91 Ibidem.

92 Ibidem, p. 108.

dominant ideology of neoliberalism with its emphasis, illusory according to critics, on the idea of equality of opportunity and the responsibility of the individual to succeed or fail. In such a situation, obtaining a doctorate is very often treated by a doctoral student as an investment in the socioeconomic context of his or her biography. As an integral part of neoliberalism, the rhetoric of human capital and productivity is related to the fact, that higher education has been plugged into free market mechanisms, and education has become a *circulating currency* that testifies to an individual's capital value<sup>93</sup>. At the same time, there is a paradoxical phenomenon of principled access to tertiary education, resulting in the inflation of the doctoral degree and increased competition for success.

In 2019, the Statistical Analysis and Evaluation Laboratory published data according to which, in Poland, as in the world, there has been a twofold increase (compared to the 1990s) in interest in doctoral studies. At the same time, there has been a 5% decline in the number of doctoral students since 2015<sup>94</sup>. As a result of the so-called Bologna Process, doctoral studies have become third-degree studies. According to the report *Doctoral Students in Poland*, in 2018, only 13% of all doctoral students graduated from doctoral studies, indicating the low effectiveness of this formula<sup>95</sup>. In 2000–2001, the number of doctoral students in Poland was 25,622. In 2005–2006 – 32,725. In 2010–2011 – 37,492. In 2015–2016 – 43,177. In 2017–2018 there was a slight decrease of 41,318<sup>96</sup>. In 2021, after the introduction of a new form of doctoral training – Doctoral School, their number decreased (from 39,000 in 2018 to 31,000). Contributing to this was the reduction in the number of places for doctoral students in each doctoral school (due to the need to fund the doctoral stipend of 100% of participants and the introduction of mechanisms for evaluating the progress of the doctoral student)<sup>97</sup>. The ratio of doctoral students to the rest of the population is 8.2 people per 10,000 inhabitants, which is a decrease from 2017, when it was 11.4. By comparison, in

93 L. M. Kuhn, R. G. Sultana, *Creating the European Learning Citizen – Which Citizen for which Europe?*, [in:] *Homo Sapiens Europæus? – Creating the European Learning*, (eds.) M. Kuhn, R. G. Sultana, Peter Lang, New York 2006; G. Biesta, *Good Education in a Culture of Measurement. On the Need to Value What We Value*, Available at: <http://lhc.ucsd.edu/mca/Mail/xmcmamil.2014-11.dir/pdfgU6kKuP7V0.pdf>, (access: 23.06.2023); G. J. J. Biesta, *Education, Accountability, and the Ethical Demand Can the Democratic Potential of Accountability Be Regained?* “Educational Theory”, 54 (3), 2004, pp. 233–250.

94 Laboratorium Analiz Statystycznych i Ewaluacji, Ośrodek Przetwarzania Informacji – Państwowy Instytut Badawczy, *Doktoranci w Polsce*, Warszawa 2019, p. 2.

95 *Doktoranci w Polsce – raport*. Available at: <https://forumakademickie.pl/sprawy-nauki/doktoranci-w-polsce-raport/>, (access: 23.06.2023).

96 Laboratorium Analiz Statystycznych i Ewaluacji, op. cit.

97 U. Mirowska-Łoskot, *Nauce zabraknie świeżej krwi. Maleje liczba doktorantów*. Available at: <https://serwisy.gazetaprawna.pl/edukacja/artykuly/8090481,nauce-zabraknie-swiezej-krwi-maleje-liczba-doktorantow.html> (access: 23.06.2023).

Western European countries, it is about 20<sup>98</sup>. The example of the United States also shows a sharp change in bridging the gender gap in favour of women. In 2010 there were 88,37% men and 11,63% women and in 2021 there are 52,86% men and 47,14% women<sup>99</sup>.

The following will be further formal-legal restructurings that, confirming Balkin's thesis, create a new reality for those who write dissertations within academic institutions. Doctoral studies in Poland were introduced by the provisions of the Act on Higher Education of 5<sup>th</sup> November 1958 (Dz.U. 1973, No. 32, item 191) as a form of higher education<sup>100</sup>. In addition, the documents defining the mode and education were regulations: Minister of Science and Higher Education of 10<sup>th</sup> February 2017 on doctoral studies education in universities and scientific units; Minister of Science and Higher Education of 13<sup>th</sup> April, 2016 on doctoral studies and doctoral scholarships, and regulations of organisational units.

In the Law on Higher Education of 27<sup>th</sup> July 2005 (Art. 2. para. 1 item 10), they were defined as “enabling the acquisition of advanced knowledge in a specific field or discipline of science, preparing for independent research and creative activity and for the award of a doctoral degree”. As a result of the amendment to the Law of 18<sup>th</sup> March, 2011, they are defined as “studies (...) conducted by an authorised organisational unit of a higher education institution, a scientific institute of the Polish Academy of Sciences, a research institute or an international scientific institute operating in the territory of the Republic of Poland established under separate regulations, for which candidates with second-degree qualifications are admitted, graduating with a third-degree qualification”. This provision clearly indicates the placement of doctoral studies in the structure of higher (university/academic) education. The third-degree qualifications mentioned here – i.e., educational effects – are realised by obtaining a doctoral degree<sup>101</sup>. However, the independent and original research work required of the doctoral student, which is supposed to have applied value which clearly indicates the scientific nature of the study, seems not to fit into the philosophy of undergraduate and graduate education<sup>102</sup>. An important legal document concern-

98 Ibidem.

99 *Doctoral student demographics and statistics in the US*. Available at: <https://www.zippia.com/doctoral-student-jobs/demographics/> (access: 24.06.2023).

100 J. Błazejowski, B. Smólski, T. Szulc, *Studia doktoranckie – co dalej?* Available at: <https://pren.umeruj.forumakademiczne.pl/fa/2008/04/studia-doktoranckie-co-dalej/> (access: 23.06.2023).

101 M. Mościcki, *Istota studiów doktoranckich po reformie z 2011 r.*, [in:] *Prawo o szkolnictwie wyższym. Nowe prawo – aktualne problemy*, (ed.) J. Pakuła, Dom Organizatora, Toruń 2012, p. 135. Available at: <https://repozytorium.umk.pl/bitstream/handle/item/478/PRAWO.pdf?sequence=1> (access: 23.06.2023).

102 Similar conclusions are formulated by: M. Mościcki, op. cit.

ing the organisation and course of doctoral studies is the regulations of doctoral studies adopted by the university senate or academic council.

Paragraph 3 of the Minister of Science and Higher Education Ordinance on Doctoral Studies in Universities and Scientific Units of 1<sup>st</sup> September 2011 [consolidated text: OJ of 2015, item 172] defines the objectives of doctoral studies, which should create conditions to:

1. conduct independent scientific research, including outside the training unit;
2. engage in scientific cooperation in research teams, including international ones;
3. work towards a scientific publication in the form of a book or at least one scientific publication accepted for publication in a peer-reviewed scientific journal of at least national scope or in a peer-reviewed report of an international scientific conference or a public presentation of an artistic work.
4. complete the study programme, including compulsory and optional classes and work placements;
5. prepare for the doctoral examinations and prepare the doctoral dissertation under the supervision of a supervisor or a supervisor and an assistant supervisor;
6. participate in the life of the scientific community at home and abroad.

Par. 5 para. 1 of the Regulation indicates the effects of completing doctoral studies, the graduate of which has:

1. knowledge at an advanced level, of a fundamental nature, corresponding to the area of scientific research conducted, covering the latest achievements in science or art, and of a detailed nature, corresponding to the area of scientific research conducted, covering the latest achievements in science or art;
2. skills related to the methodology and methodology of scientific research;
3. social competencies relating to scientific research activities and the social role of the scientist or artist<sup>103</sup>.

The introduction of such changes by the legislator (placing doctoral studies in the structure of higher education through the introduction of the qualification framework) was aimed at ensuring the quality of education, verifying the level of knowledge and raising the level of doctoral studies. In addition, it was also essential to bring doctoral education in line with the forms of education at other European universities within the framework of the so-called Bologna Process<sup>104</sup>.

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103 A. Jakubowski, *Zarys statusu prawnego studiów doktoranckich*. Available at: <https://www.analizy.edu.pl/analizy/zarys-statusu-prawnego-studiow-doktoranckich.html> (access: 23.06.2023).

104 M. Mościcki, op. cit.

In considering doctoral studies, it is also worth referring to the candidate selection mechanisms associated with the admission procedure. According to Article 196, the criterion for admission of a candidate to a doctoral program used to be “possession of a master’s degree or equivalent and fulfilment of the recruitment conditions”.

The amendment of 18<sup>th</sup> March 2011, paragraph 2, introduced a provision for which enrolment in doctoral programmes is by means of a competition, the criteria for which are defined by the senate or the academic council of the unit.

The duties of a doctoral student (Article 197, para. 2 and Article 201, para. 2, point 2) were to: follow the curriculum of the doctoral programme and conduct research and submit reports on the progress thereof. In addition, the doctoral student should undertake professional practice in the form of teaching (or attendance at such classes taught by an academic staff member). Failure to fulfil these tasks may result in removal from the list of doctoral students. A doctoral student is also obliged to pass doctoral examinations in the primary discipline corresponding to the topic of the doctoral dissertation, an additional discipline, and a modern foreign language.

Doctoral studies under the Law on Higher Education and Science 2.0 will expire on December 31, 2023.

Doctoral studies have been the subject of many texts in the scientific and popular press, as well as discussions in doctoral forums or the subject of MEMEs. The SWOT analysis by Dokowicz et al. revealed several problems associated with doctoral studies. PhD students negatively assessed “education based on knowledge and not on skills and social competencies inadequate for the degree and the needs of doctoral students”, “poor individualisation of doctoral studies”, “lack of a defined role of the doctoral supervisor”, “treatment of doctoral students as a cheap labour force of the university”, “low quality of research conducted”, speed and quantity at the expense of quality, and “unclear social status of doctoral students”, “low efficiency,” but also “conduct of doctoral studies by units of low scientific level”<sup>105</sup>. On the other hand, the following were pointed out as positive features of third-degree studies: social respect towards doctoral students and therefore the perception of studies as elite, “mobility of doctoral students” associated with internships, conferences and opportunities for international exchange, “the possibility of deciding on issues important to doctoral students”<sup>106</sup>. The analysis also identified threats, which include the massification of doctoral

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105 M. Dokowicz, K. Kropielnicka, J. Kicielińska, *Analiza SWOT*, [in:] *Diagnoza stanu studiów doktoranckich 1.0. Najważniejsze problemy*, Krajowa Reprezentacja Doktorantów, pp. 11–12. Available at: [https://www.researchgate.net/publication/313036753\\_Diagnoza\\_stanu\\_studiow\\_doktoranckich\\_10\\_najwazniejsze\\_problemy](https://www.researchgate.net/publication/313036753_Diagnoza_stanu_studiow_doktoranckich_10_najwazniejsze_problemy) (access: 23.06.2023).

106 Ibidem.

studies associated with the declining quality of doctoral education and the decline in the prestige of the doctoral student<sup>107</sup>.

The status of doctoral students, who combined the roles of student and employee, was also a significant problem. This made it necessary for them to teach and perform organisational tasks as well as scientific work. Despite this, they had no labour rights<sup>108</sup>. It is worth mentioning that doctoral students were not bound to the university by an employment relationship but by an administrative-legal relationship of participation in studies conducted by the university<sup>109</sup>. On the other hand, they had to study and pass examinations and obtain credits provided for in the doctoral studies program. The scholarship system was organised according to the rules for awarding student scholarships; hence it emphasised competition and quantitative criteria, getting good grades and earning credits for organisational and academic achievements. Often this was not related to the progress of the dissertation or its quality.

It is noteworthy that a large percentage of doctoral students drop out after the first year. Sonia N. Young et al. reports that this is between 36 and 51%<sup>110</sup>. They cite as reasons for this: “lack of emphasis programmatically on doctoral advising and mentoring” and “incompatible personalities” of supervisor and PhD student, assignment of additional responsibilities without support, isolation, lack of understanding of the dissertation writing process, and the questions to be asked, ineffective communication between supervisor and PhD student resulting in delays in writing the dissertation and unclear requirements<sup>111</sup>.

On the other hand, significant in achieving success in writing a doctorate are good communication between the promoter and the doctoral student, clearly defined goals and expectations, but also, importantly, “encouraging independence and collaboration in a supportive environment, reciprocal relationship, and providing chances for professional development”<sup>112</sup>. In addition, doctoral students participating in the study pointed to the importance of setting deadlines for their doctoral work, along with the time allotted for research and subsequent assignments and a training program that allows them to develop critical thinking

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107 Ibidem.

108 M. Dokowicz, J. Mrozek, M. Jędrzejczak, *Uprawnienia*, [in:] *Diagnoza stanu studiów doktoranckich...*, p. 33.

109 M. Skąpski, *Charakter prawny studiów doktoranckich*. “Państwo i Prawo”, 2, 1998, p. 68; idem, *Glosa do wyroku SN z 6 września 2000 r., II UKN 699/99*. “Orzecznictwo Sądów Polskich”, 4, poz. 58, 2001.

110 S. N. Young, W. R. Vanwyke, M. A. Schafer, T. A. Robertson, A. V. Poore, *Factors Affecting PhD Student Success*. “International Journal of Exercise Science”, 12 (1), 2019, pp. 34–45.

111 Ibidem.

112 Ibidem.

and independence as researchers and young scientists<sup>113</sup>. In doctoral school, the doctoral student is to have a status similar to that of a young researcher.

From the beginning of the 2019/2020 academic year, the Act of 20<sup>th</sup> July 2018. Law on Higher Education and Science (Journal of Laws of 2018, item 1668, as amended) introduced doctoral training to last between 6 and 8 semesters. This change was dictated by several factors as well as the belief that the old formula for doctoral training had been exhausted. The European University Association Council (EUA Council) Meeting in Seville in 2010, which was devoted to the problem of standardising doctoral training in Europe, was crucial in this context. One of the essential trends in this education, related to its massification, is structuration, i. e. the change from an individual master-student relationship to a model of teaching in larger groups of students/scholars. Such a phenomenon is called deprivatisation, and the rise of the institution<sup>114</sup>. Another significant development related to the structure of doctoral students was the diversification of their training so that it included, among other things, soft skills, project or team management skills. Jan Szmidt, President of KRASP, presented this vision of a doctoral school: “A doctoral school is a kind of ‘tool room’: it is supposed to provide the tools for conducting independent research and writing a scientific thesis – a doctorate – based on this research. Although still under the scientific supervision of a supervisor, but already on the way to scientific independence”<sup>115</sup>.

How is the aim of doctoral training defined? It is to write a doctoral dissertation due to completing the training programme and an individual research plan. The latter is a kind of tripartite agreement between the doctoral student, the supervisor(s) and the doctoral school<sup>116</sup>. Doctoral schools aimed at increasing the quality of doctoral training and, in the didactic context, making it part of an elite model. The doctoral school, with its Individual Research Plan fits these expectations.

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113 Ibidem.

114 A. Kraśniewski, *Jak kształcić przyszłych doktorów?* “Forum akademickie”, 5, 2010, Available at: <https://prenumeruj.forumakademickie.pl/fa/2010/05/jak-ksztalcic-przyszlych-doktorow/> (access: 23.06.2023).

115 Szmidt J., *Program a nie instytucja*. “Forum Akademickie”, 3, 2019.

116 *Szkoły doktorskie*. Available at: <https://studia.gov.pl/doktoranci/szkoly-doktorskie/> (access: 23.06.2023).

## Research results: the perception of doctoral reality by former and current doctoral students

In line with Raymond Boudon's methodological individualism:

“Social change, even at the macro-sociological level, is only intelligible if analysis comes down to the level of the most elementary social agents or actors who compose the interdependent systems in which he is interested (...) the explanation of any social phenomenon, whether situated at the macroscopic level or at the microscopic level, assumes an analysis of the behaviour of the individual actors who make up the system at the centre of which is the phenomenon”<sup>117</sup>.

Whereby it is the “micro-realities” and identities of individual, concrete people that are the starting point for the acquisition of “generalised macro-sociological and macro-statistical data and a variety of sociological and demographic trends”<sup>118</sup>.

It is also worth recalling here Randall Collins' assertion that macrodata can only be interpreted in the context of micro-situations:

“Microsituational encounters are the ground zero of all social action and all sociological evidence. Nothing has reality unless it is manifested in a situation somewhere. Macro-social structures can be real, provided that they are patterned aggregates that hold across microsituations, or networks of repeated connections from one microsituation to another (thereby comprising, for instance, a formal organization). But misleading macro 'realities' can be built up by misconstruing what happens in microsituations”<sup>119</sup>.

This belief is an important starting point of my research, which I conducted with doctoral students and graduates. Following the principles of qualitative research, I did not formulate hypotheses<sup>120</sup>.

The main research problem I undertook took the following form: **How do former and current doctoral students perceive their stay in doctoral studies/doctoral school?**

I also identified three specific problems:

1. How do current and former doctoral students understand the concept/essence of scientific development in the context of their institutionalized study?

117 R. Boudon, *The logic of social action: an introduction to sociological analysis*, Routledge & Kegan Paul, London 1981, pp. 86, 164. See also: A. Gromkowska-Melosik, *Edukacja i (nie)równość społeczna kobiet. Studium dynamiki dostępu*, Impuls, Kraków 2011, p. 264.

118 A. Gromkowska-Melosik, *Edukacja i (nie)równość społeczna kobiet. Studium dynamiki dostępu*, Impuls, Kraków 2011, p. 264.

119 R. Collins, *Situational Stratification: A Micro-Macro Theory of Inequality*. “Sociological Theory”, 18 (1), 2000, p. 18; I also use this way of thinking in the book: *Edukacja i (nie)równość społeczna kobiet...*

120 U. Flick, *Projektowanie badania jakościowego*, PWN, Warszawa 2010, p. 14.

2. To what extent do students at the doctoral school and graduates of doctoral studies perceive themselves as simple participants of third-level studies and to what extent as young scientists?
3. How do students in doctoral school and doctoral graduates perceive the role of the supervisor in dissertation preparation?

The research carried out falls within the interpretative paradigm, referring to the assumptions of social constructivism. Therefore, I do not intend to discover any ultimate truth – neither about reality, people, nor the phenomenon I am investigating. I want to understand the phenomenon I am investigating and put it in its most typical context. In doing so, I am convinced that my “personal presence” during the research process, my “knowledge about this field,” and ultimately, my “reflexivity” I bring to the role have enabled me to interpret the research material obtained responsibly<sup>121</sup>.

I aim to try to capture “the way in which the people being studied understand and interpret their social reality” in which they live; hence, I am looking for “meaningful rather than representative data”<sup>122</sup>. I am aware that the results of my research will not be representative, and the knowledge gained will only relate to the phenomenon analysed in a specific context and time<sup>123</sup>. In the course of researching the experiences of doctoral students and young researchers – graduates of doctoral studies, I referred to the “personal knowledge” of their participants and their views on the phenomenon under study, which was or still is a part of their daily social practice, as well as to the “group knowledge”, the source of which is their relatively common experience – education in the formal space of the university (with full awareness of the paradoxical nature of the fact that each participant in the research may refer to a different version of reality in their observations)<sup>124</sup>. The analysis and interpretation of the views presented by the research participants on the phenomenon I am interested in are intended to allow for an understanding of the phenomenon and, consequently, also for a reference – at least conditionally – to the underlying social processes<sup>125</sup>.

121 U. Flick, *Designing Qualitative Research*, Sage, Second Edition, London 2018, p. xi. Also compare my considerations from the book, *Edukacja i (nie)równość...*, p. 271, in which I used the statements quoted from U. Flick.

122 P. Mayring, *Einführung in die qualitative Sozialforschung*, Psychologie Verl-Union, München 1990, p. 2.

123 A. K. Shenton, *Strategies for Ensuring Trustworthiness in Qualitative Research Project*. “Education for Information”, 22, 2004, p. 70.

124 N. Golafshani, *Understanding Reliability and Validity in Qualitative Research*. “The Qualitative Report”, 8 (4), 2003, Available at: <http://www.nova.edu/ssss/QR/QR8-4/golafshani.pdf> (access: 25.06.2023).

125 D. Beraux, P. Thompson, *Introduction*, [in:] *Biography and society, the life history approach in the social sciences*, (ed.) D. Bertaux, Sage, California 1981.

I used an individual semi-structured in-depth interview in which I attempted “to understand the world from the subject’s point of view, to unfold the meaning of people’s experiences, to uncover their lived world prior to scientific explanations”<sup>126</sup>. Each interview was, therefore, constructing (with him or her) a version of the world<sup>127</sup>. So, I was not aiming for a positivist endeavour to reflect the reality under study. My aim was discourse and negotiation of the nature of the world experienced<sup>128</sup>. Hence, in interpreting my research, I will not formulate any generalized conclusions or put forward theses relating to the existence of trends. The picture of the studied phenomenon that emerges from my analyses is fragmentary<sup>129</sup>.

My research was based on purposive sampling, and the primary criterion for selecting the people included in the research was to be a third or fourth-year doctoral school student and a doctoral graduate from the last eight years. This made it possible to interview people whose experiences are relatively recent, and yet they are able to reflect on the period of doctoral training that was/is theirs. Furthermore, it can be assumed that they are aware of the role that doctoral school/doctoral training has played in creating their identity and biography. The research was conducted in June-July 2023. It involved five doctoral graduates and five doctoral school students from six large public universities in Poland. To analyse and interpret the research material obtained, I replaced the personal data of the respondents with randomly assigned names.

## The essence of scientific development

From the perspective of academic standards, the essence of the academic development of doctoral students is the deepening of their knowledge, the deepening of their competences in the field of research, particularly in the theoretical and methodological context, as well as gaining proficiency in the sphere of preparing texts and, above all, the dissertation. An equally important component is participation in the academic community at the university and discipline level. A visible sign or evidence of progress here is publications, participation in

126 S. Kvale, *InterViews. An Introduction to Qualitative Research Interviewing*, Sage, Thousand Oaks 1996, p. 1, compare also: K. Konecki, *Studia z metodologii badań jakościowych. Teoria ugruntowana*, PWN, Warszawa 2000, p. 18.

127 D. Silverman, *Interpreting Qualitative Data, A Guide to the Principles of Qualitative Research*, Sage, Los Angeles 2011.

128 *Ibidem*.

129 U. Flick, *Introducing Research Methodology, Thinking Your Way through Your Research Project*, Sage, Thousand Oaks 2020; In the paragraphs above on the methodological basis of my own research, I have used very small extracts from my book *Edukacja i (nie)równość...*, op. cit. pp. 269, 272, 274–275, 277–278.

conferences and seminars, and involvement in the daily life of the faculty, but, of course, the conduct of doctoral-related research. What we have here is a combination of a cognitive context with an organisational or affiliative one, with a simultaneous orientation towards learning from professors (not only their supervisors) who can share not only their knowledge but, above all, their own experiences and wisdom. All of this, in its totality, determines academic development; both strictly intellectual and scientific and determines the potential to achieve academic advancement.

Statements by doctoral students from doctoral studies strongly support the above theses. Here Margaret cites – in the context of her scientific development – its three components, which are inseparable: work on oneself understood as self-development, relationship with the supervisor and the scientific community, and building scientific output. These components intersect with the process of preparing the doctoral thesis, in which reading texts and using the knowledge gained in the course of writing plays an important role. All of this is incorporated into one's academic, and often personal, biography.

“Such three parts. Such a work on oneself. One thing such self-development. The second thing is the relationship that one builds with one's supervisor, promoter, but not only, because also with the people with whom one works. And the third thing is I would say that these are all the things that make up the various achievements that give you the opportunity to obtain a doctoral degree, i. e. all kinds of projects, publications, conferences. It is known that somewhere through all these three things, the writing itself goes through, because it is also work on oneself (...) because it is known that if we read something while preparing for a conference or writing an article, it also often gives us some kind of a foundation that we can use in the dissertation (...) It seems to me that they interact with each other in a sense [these three parts] and it is certainly difficult to write a good dissertation, one that will satisfy us, if one of these parts breaks down somehow biographically”. (Margaret)

Alice situates the focus of her development in perfecting her writing craft, in which both the process of writing the text itself and its publication and reception in the scholarly community are important. Her fascination with the writing process itself and the dissemination of the results of her scientific investigations is evident. This is what forms an integral and most important part of her scientific identity.

“The most important thing, for me, in my identity as a scientist is actually publishing the text and writing. And I think discovering more and more aspects that interest me and just describing them, doing research as well. Whereas I think self-improvement in my and development in my sense, as I understand it, is to produce a text. And I think this is the most important thing for me, that these texts are read, that they are published. It gives me satisfaction if someone reads them, if I see these texts being quoted, I think that

is the greatest reward for me and that I personally would like to develop my writing workshop the most". (Alice)

Patricia, on the other hand, puts – in the context of her analysis of scientific development – the cognitive curiosity that is associated with conducting empirical research. She has a clear passion for stepping into the role of the scientist-empiricist:

"With me, it's a desire to simply investigate certain situations. And a fierceness. (...) I also even finished my master's degree with a research thesis, because that's always interested me (...) I was always doing research, even in the institutions I worked in. (...) I was always doing surveys somewhere (...) And after I did my first basic research (...) I got published in 2003, when I was doing another postgraduate course. And that's when the bug came back that I could do something with it further". (Patricia)

Very interesting is the approach of Michael, for whom the essence of scientific development is to obtain the potential to belong to an elite group and to be able to co-create an environment of people interested in scientific problems, using the hermetic language of his discipline. For him, science is an extraordinary space, inaccessible to laypeople, and the goal is to take on the role of a promoter/master in the future. Michael is aware that every scientist participates in an inter-generational community of scientists whose 'master competence' is passed on through the successive decades of the discipline's history.

"It was certainly most important for me to be included, so to speak, in this kind of elite group that are scientists. It's as if this has guided me from the very beginning. Knowing that anyone can have a master's degree, whereas when it comes to a doctorate, there are far fewer people (...) was one of my main thoughts (...) In order to be able to communicate with these educated people, it was also important to me whether these doctoral studies would also teach me how to communicate, on a higher level, which would allow me to build up a language that would be adequate, which would also make me belong to this group". (Michael)

Michael also sees academic development as:

"Climbing the ladder of academic promotion" and "building your image in this environment and wanting not to be an inferior scientist or one who may have a professorship, but nobody knows you and doesn't associate with you anyway (...) He states: Whereas I know that this cannot be achieved without having the support of the environment. (...) I also have this idea that it is also important that you leave something behind in a scientific text and that you can be a master for someone. Someone can teach from you". (Michael)

Also, when talking about scientific development, Sophie also points out the importance of following one's master as the epitome of supreme authority and the necessity of fulfilling the tasks set by the master, of learning through the

experience of communicating with him or her, of discussion. He puts it metaphorically:

“What I would do, if I could, would be the first one to walk behind my professor, carrying her briefcase, towards such a very stereotypical, maybe traditional, take. I don’t remember who told me this (...) but I was delighted (...) that when he started working at the university it was his supervisor who said well, now you sit here, you’ve got your desk in the corner and this is the literature you’re supposed to read first and then come and we’ll start talking. I think to myself – yes! I will also ask for the desk in the corner and this obligatory literature that I should read (...) and I won’t come up with it myself at all, that I should read it, and then I will only go with my professor, learn, and develop. And learn, not to learn necessarily in a lecture, but (...) by taking a model, by experience, by observing how she acts, what she does, what decisions she makes, how she solves various difficult issues and other organisational ones even at the university, how she conducts her research. And such a bit of following the master (...)”. (Sophie)

Sophie also points to the vital importance of functioning in a scientific environment that fosters the development of passions and the improvement of one’s own scientific craft. She is clearly enthusiastic about being part of an academic community, which she sees as a source and inspiration:

“I need other people to develop (...). if I sit alone in my study, there is no chance. I need contact with other people and conversations (...) which in me generate ideas etc.” (Sophie)

When talking about academic development, Sophie refers to the fact that a doctoral student has to live in two and sometimes three completely different worlds: the academy, private life, and the professional work that has to be undertaken due to the financial situation associated with a low stipend. He is thus faced with the task of harmoniously combining all these roles, which is very often almost impossible. However, he places emphasis – in his academic development – on writing his thesis, being in the library, and studying literature.

“In the implementation of my doctoral studies I have encountered all these good things, as well as all the difficulties. It’s not at all about those difficulties at university, it’s just life. Whether we got married, whether we got divorced, whether we had children, whether we had family members die, whether we lost our jobs or got them back. (...) It seems to me that if I had a comfortable environment created for me to be able to just get on with the subject (...) and not that the doctoral studies and the work on the PhD are (...) kind of parallel to the kind of standard life I lead, to a paid job, to dealing with various problems, then maybe this scientific development would be in such an ideal version that I could spend as much time as I want in the library, not worry about other things in the meantime, go to all the conferences I want to, carry out all the internships, placements abroad, whatever comes to mind, because it’s actually ideal and impossible. We have children, a family, various responsibilities and professional work (...) To me it seems that (...) I had too many burdens around me that were holding me back, too

many tasks on a daily basis not related precisely to scientific development and to this work (PhD – AG-M supplement). If I had a more comfortable environment (...) then I think it would have been different (...) because various ideas were lost for lack of time and opportunities, not some obstacles that stood in the way on the side of the university or my [intellectual] impossibilities". (Sophie)

Students at the doctoral school have a similar approach to scientific development; the differences are not due to the organization of the doctoral programme but are of a very individual nature. Daniel places his scientific development in two areas: doing science and teaching, which he sees as a form of disseminating the scientific achievements of others and his own. Interestingly, contrary to popular opinion, he considers teaching activities to be also important as scientific activities. In his view, they are complementary to each other. In contrast, he finds the relationship with his supervisor less important.

"(...) I look at it from two perspectives. Certainly, in the first perspective, I see this aspect of searching, discovering, asking questions, verifying certain hypotheses, and sometimes just exploring. When it comes to social life, the kind of life in my discipline, which is pedagogy, [the most important thing is] to look for aspects that help with work, with education or with didactics. And this is where the other perspective, which is even closer to me, automatically comes in, which is didactics, that is, teaching, sharing and, let's say, the theory that we learn from prominent ancestors or that we ourselves bring into the world of science somewhere. Passing it on to students, to young people, to anyone else or to colleagues at conferences. And I think this combination should be the standard for a scientist, for a PhD student, at least at the level of awareness of thinking about being a scientist". (Daniel)

Thomas holds a very traditional view of the essence of scientific development. For him, the essence of scientific development is to deepen one's scientism in the most primary sense of the word, in an ontological or epistemological context. He refers to scientific fundamental questions and dilemmas (for example, relating to the problem of the existence of truth) – their exploration is to be the source of scientific development. Thomas's views are placed in the macro-context of the development of scientific thinking. But at the same time, he shows both a very deepened awareness of his scientific goals and of himself as a young scientist. In doing so, learning about himself (in a scientific context) is for him an extremely important component of scientific development.

"The search for such a root cause for me as a scientist is always a goal somewhere, the discovery of what is still unknown (...) I don't even remember if it's in Jewish mythology where they were looking for the root cause of the Akasha library, that is, that source of all initial knowledge. Because [it] kind of represents for me the idea of this personal development and scientifically (...). I can see how it has also changed me as a person (...) I don't stop at such cursory facts, but I usually try to get to the heart of the matter, if that is possible, if that heart exists. Striving to know, to get to the truth,

because it seems to me that sometimes it is also the core that is referred to as the truth. The pursuit of knowledge, of truth, because it seems to me that it is also sometimes the essence of this primeval cause that is referred to as truth. However, I realise that we live in times when truth is also fragmented and relative. But even more important to me than reaching this truth is the path I take and that I am able to travel this path consciously. Because I won't always get to the bottom of things (...). But (...) my doctoral studies have somewhere broadened my horizons enough that I am able to observe this path of mine, observe my thoughts, how I structure my arguments... It seems to me that this is the most valuable thing for me in this development, that I am able to analyse my thinking". (Thomas)

Similar traditional views on the essence of scientific development are held by David, who alludes to the neoliberal model of development and its associated scientific competitiveness in his speech. He rejects such a model, orienting himself to traditional scientific values.

"I do not approach scientific development in a mercantile way. My goals are not set by the number of points for an article etc. For me, the goal in itself is to acquire knowledge and broaden my competences. That is why I am far removed from this modern thinking that you have to win these grants at all costs, that you have to go somewhere and publish every now and then, just to get published in a better and better journal. It seems to me that there is something wrong in such an approach to science, in such an orientation towards very instrumental goals, because somewhere in there, the axiology is lost, some values that should also accompany the development of science". (David)

Diana, on the other hand, representing doctoral students, points out, as Sophie did previously, the relationship of learning from a master and learning within the academic community in which a doctoral student's scientific development takes place:

"First of all, the mentoring and the people we work with, from whom we take an example. This is the most important thing. Also, the infrastructure that the university gives, the classes that you can participate in, (...) which are taught by specialists in their fields and disciplines". (Diana)

Alexandra focuses her attention on the applied value of scientific research. For her, this contribution to changing reality – through new discoveries – becomes an essential part of scientific development. Here, we have a reference to engaged science, for which social practice is extremely important. Science and research can provide the impetus to change not only this reality but also people. As a scientist, she wants to play the role of animator and inspirer – in groups of people.

"From a subjective perspective, [the essence of development is] the desire to change the world, to make the world a better place for everyone to live in precisely through scientific development (...) so that people simply live better. (...) Such a desire (...) to inspire people around us, to work together, to keep moving around changing this world for the better. So as to encourage those who are somewhere around me to act together. This also

includes the students with whom we must teach (...) From my perspective, it's about inspiring [others]". (Alexandra)

## Doctoral studies programme and dissertation writing

Participation in doctoral studies and doctoral training is, of course, not only a period of preparation for the doctorate but also a period of compulsory training. The question is: how is it perceived by doctoral students? In the most general terms, it can be said that the main leitmotif of opinion in this regard concerns the incompatibility of training programmes with scientific development and doctoral writing. It is acknowledged that there is a fundamental lack of integration in this area.

For example, Sophie clearly separates the two spheres of doctoral work and doctoral training. To her way of thinking, these two areas are not complementary. In her doctoral studies, she lacked meetings with professors who would showcase their work, share their own reflections on how to approach academic work, and conduct research. She is critical of the lack of willingness on the part of academic staff in the area of scientific interaction with doctoral students.

"These studies were easy for me (...) I was afraid that the level would be very high, that I wouldn't manage (...) I didn't have to put in an unknown amount of effort to finish these studies. The studies themselves, but not the writing of the thesis or the research for the PhD, because that's kind of a separate, different story. It wasn't that easy anymore, absolutely. (...) No subject was memorable to me, why did I study it? (...) Who am I going to learn something from? Am I supposed to figure it out myself in the study? Of course I can read Heller's *How to be a Real Scientist* and go on and even try, but if I have a lot of people at the Institute, why don't I get in touch with them? Why don't they tip their hand? Because I'm also the kind of person who has no problem sharing my experiences with someone, or my workshop, or my materials, or my ideas (...) Anyway, I was hoping for a bit of community and openness. I would rather think that there needs to be more contact with professors and with masters". (Sophie)

Michael, too, notes the "dual-track" nature of doctoral training and doctoral preparation that exists in doctoral studies. He is critical in this respect, emphasizing the very little contribution of the implemented curriculum to his academic development and the lack of concern for transferring teaching competencies to doctoral students.

"As far as the doctoral studies were concerned, they might not really have been there, and I could have achieved the same result by going extremist and having this promoter. Well, when you look at it like that, there were such episodes, such snapshots: here philosophy, there a monograph lecture not at all related to anything that would translate into writing a thesis. We didn't have such classes on how to write a paper, how to prepare

for a conference, how to do didactics (...) In fact, we taught classes without having any complete preparation”. (Michael)

“It was such an adventure more than such studying, because I don’t really remember acquiring any such factual knowledge, which would be something new, something that I already knew before or didn’t know”. (Michael)

For some of my interviewees, the doctoral programme was too extensive. They point out the excessive number of subjects, the multitude of credits, and written assignments which were time-consuming and took place at the expense of writing the dissertation. They believe that doctoral studies should be primarily a time of working with a supervisor, regular doctoral seminars, and literature studies and research.

This is Alice’s perspective:

“I will honestly say that for me the subjects [were] a bit too much, especially over the four-year study period. I think that (...) doctoral studies should be based primarily on working with a supervisor and just getting on with the dissertation and your research writing. Maybe that’s also why I look at it through such a prism, because I know people who complete their doctoral studies in Germany (...) In my opinion, the subjects could be reduced to a certain minimum and come down, for example, to the workshop, to research methodology, to issues (...) mainly related to the doctorate, to writing the doctorate (...). And I think methodology would be one such key aspect”. (Alice)

A similar attitude can be found among the students at the doctoral school; an excellent exemplification of this is the opinion of David, who believes that the training programme in the doctoral school is overly extensive:

“I am in favour of a definite reduction. I think that instead of doing ten different courses of two ECTS each, being in a PhD school, social sciences (...) I would expect two courses, theoretical ones like that, which would be really solid, well prepared. Where I would get to know these super latest, cutting edge theories, work them out well for myself somewhere and look at them in a broader perspective. So that I would have the feeling that I know what theories are gaining popularity now and why (...) On the other hand, some fragmentation of this into courses (...) which contribute little often.... And there really should be fewer of them. There should be more emphasis on personal development through the writing of articles or [what] should also serve the development of the dissertation afterwards. There should be more emphasis on doctoral students focusing on writing that dissertation, though, rather than passing a thousand courses. I have the impression that someone had good intentions when thinking about these doctoral schools, but I think there was a lack of imagination and faith that doctoral students are able to take care of themselves and that they can take care of their competences (...) Still, you need to have some elementary trust in people in doctoral schools and to believe that they will themselves undertake some activities that will be best for them, so that they can develop their competences”. (David)

In contrast, Margaret's opinion towards the training is different and more positive, although she draws attention to the apparent optionality of the subjects; PhD students were expected to omit subjects from their own discipline in their choices:

“We didn't have a lot of subjects (...) I had a lot of time (...) These classes were so opening that I had the opportunity to meet various other young people who (...) have similar goals (...) And exchange some experiences, so it's that much more interesting (...) It's just that the programme was arranged in such a way that we had a lot of these subjects (...) general, university subjects. (...) I didn't really like this approach, which said that we shouldn't choose things that are related to our studies because they don't develop us (...) we were supposed to sign up only for things that are not only related to our doctoral studies. It was actually such a bit of a downer, because since we have subjects to choose from, this freedom of choice should be unrestricted by major, discipline, etc.” (Margaret)

The problem of the 'superfluity' of subjects outside the 'mother discipline' arises frequently. It is worth quoting a few statements, as they testify to the fact that the programme of the doctoral school is not in line with the expectations of the students, or to the mono-disciplinary awareness of the students, who are only interested in their area of research, usually related to one discipline, and regard knowledge and theory from other disciplines as superfluous.

“Overall, I think the programme was good, whereas I would have dropped subjects from outside the discipline (...). I think it is unnecessary at this stage (...) I understand that as scientists we should be developed comprehensively, but still, if something is for everything, it is for nothing. If we develop in one direction [then these] additional subjects outside the discipline (...) take time (...) It also depends on who was teaching (...) There were instructors who did not require any credit. There were instructors who required you to write something, even a short page article or an essay, but that still distracts from that main goal of writing a dissertation, research or writing articles. And let's not kid ourselves, there are still people who are already in PhD school and outside of their PhD they are also doing something, whether they are working or have families or whatever. So that I think it was unnecessary [subjects outside the discipline]”. (Emily)

Daniel, too, points to an overly extensive programme of non-doctoral preparation subjects, although he strongly suggests the introduction of teaching preparation classes:

“There were also a few subjects that were similarly, well, let's just say even less than optional in that sense of usefulness (...) It is aggravating for some, especially for those who are still additionally forced to work somewhere (...) In fact, the most important thing in what we do is the preparation of the dissertation. Without that, nothing else really matters. I nevertheless think that some of the subjects that are from the doctoral school are valuable. For example, didactics in higher education. (...) I work as a coach, so I've actually been with didactics for a few nice years. I don't have any problem with it.

On the other hand, I see my colleagues (...) who don't have such familiarity with how to work with other people, how to share this knowledge further, because there wasn't such preparation in everyone (...) It would be worthwhile for such subjects [to be] of the didactics type, i. e. how to work didactically, what methods to use (...)" (Daniel)

Other research participants also stressed that an important element of doctoral training should be – didactics in the university – and that such classes were not provided. This aspect was pointed out by almost all of my interviewees, regardless of discipline and research centre, both in doctoral school and doctoral graduates.

"[I think] some of the PhD students had this fear going into their first taught classes [with students] that they were not fully prepared (...). And so I think to myself, if I were to point to a subject that could be some kind of complement to the doctoral programme (...) it would be some kind of preparation just for teaching students. I think this could help a doctoral student feel more confident in this new role as a lecturer". (Alice)

Diana, too, is critical of the training programme due to the lack of integration of the classes in their entirety and the lack of orientation towards developing methodological competence. Like the research participants cited above, she also draws attention to the lack of course offerings that fall within the discipline of the doctorate. Furthermore, he notes the negative impact of the changes to the regulations of doctoral studies and Act 2.0 on education, exposing their "interpretative chaos":

"We lived in a vacuum in which we did not know what was going to happen at any given moment and what to expect, because each person understood the laws and internal regulations of the university in their own way and implemented it in that way later (...) also the ignorance of some of the regulations by the staff or the office of the doctoral school itself had a negative, detrimental effect. (...) The problem was the lack of enough methodological classes and the multiplicity of subjects. I think there were a lot of subjects that doctoral students chose just to complete a grid of hours that would simply be of no use to them in their research career or further education. The upside was that we practically had to choose these subjects ourselves, but the offer of our first year was initially very poor in terms of classes in our discipline". (Diana)

Similarly, Patricia draws attention to the poor organisation of training in doctoral studies – in the context of methodological subjects, which are the basis for conducting the research necessary for preparing a doctoral thesis:

"Personally, I missed the full methodology [for] the work that was in front of us and it was sometimes such a search in the dark as to what came out of what. I suspect it would probably have been easier for everyone if it had been in the first, maybe the second year of classes rather than at the end, because (...) it was probably in the third year and it was only then that we were opening some people's eyes. What are we facing, what is it supposed to look like?" (Patricia)

The problem of training – in the context of acquiring methodological competence – appears in the statements of doctoral students very often. Although, in the case of students at the doctoral school, there is, as in other cases, the theme of the difficulty of adapting the programme to a group whose members are writing doctorates in different disciplines. On the other hand, going beyond the methodology typical of one's discipline is seen as very inspiring. An excellent example of this approach is Thomas's statement:

“Methodology, for example, is a subject that we all wanted to attend and I suspect that because so many different disciplines were involved, it was hard to focus on one particular methodology. Therefore, we had very philosophical issues raised, related to the epistemology of research. Nevertheless, importantly, I think they were very developing, but also a lot of my colleagues I spoke to often didn't have the philosophical knowledge base to go into such deep reflections on epistemology, or ontology and teleology of research, because it was mainly around these topics that the subject was focused. This subject, I believe, should be more practical. I realise what the limitations are also because, as I mentioned, we choose our subjects, so these groups are different in which we participate, there are psychologists and journalists and lawyers, well educators. And it's just that our methodologies are often very different”. (Thomas)

Interestingly Thomas believes that there are too few subjects, and the ideal solution would be to introduce individual seminars with professors from different disciplines.

So, it is not only in this statement that it is clear that the attempt to unify the education of doctoral students from different disciplines “across the board”, for example, in methodology, was not necessarily successful. Moreover, the reason for this was the different starting knowledge depending on the scientific discipline studied previously.

For her part, Margaret emphasises the importance of methodological classes; for her, doctoral studies are also a place where one acquires contacts that help one to develop.

“I remember that we had such methodological classes (...) very necessary, because even if someone deals with the methodology of qualitative research, this methodology of quantitative research (...) should be known at least to a lesser extent, so that one knows what to do with what (...) When we have already had classes with someone, it is easier for us to approach someone and ask in order to complete something practical than [if] it were to be completely anonymous”. (Margaret)

The same person draws attention to the problem of language training in doctoral studies, especially in the situation of the new legislation in which the necessity to pass the doctoral exam in a modern foreign language has been abolished, replacing it with a certificate at B2 level, which is equivalent to the certificate issued to bachelor's students:

“It is known that people come in different levels of language, now there are these certificates (...) This has a real impact on the offer of education, because there was such an idea that part of the education should be held in English. (...) There’s also the problem that if you want to organise meetings in English, you know that some people won’t be able to participate fully, either because they can’t understand everything, or they can’t talk to someone, or they can understand everything, but they’re blocked from speaking the language. (...) So this is also a challenge for the system. How do you organise it? Because it’s clear that some of us are expecting that kind of offer”. (Margaret)

In the context of the extensive course offerings, both in doctoral studies and in the doctoral school, the question arises about the state of consciousness of doctoral students, which can be reduced to a trivial question: did they feel more like students or researchers? In the past, the answer to this question was simple: doctoral studies had a decidedly elitist character, and their essence was academic work rather than class participation. After a certain massification of access to the doctorate (written in both full-time and extramural forms), this question gets a completely different context. Many interviewees recognize the duality of their role: that of a young researcher and a third-level student. At the same time, they point to a kind of suspension between these two roles. Ambivalence in this regard is evident in many of the statements made by participants in the study. As an example, Alice points to this duality, which she describes as an internal conflict:

“To a greater extent I felt that I was a young researcher, whereas I felt that I was a student still. And I can’t hide the fact that I also once discussed this with other PhD students, because I felt an internal conflict of sorts: on the one hand I was already teaching students, publishing texts and doing – I already felt this way – science seriously, and on the other hand I was attending classes and as a student and was, in a way, obliged to e.g. pass courses. And so I felt a bit of an internal conflict between the two. On the other hand, I think I felt more like a researcher or a young scientist. If I had to put it into percentages, I think I would say 40% student and 60% young researcher”. (Alice)

For Alice, her doctoral studies were first and foremost a period of academic development, preparation for an academic career, and only marginally a time to complete the curriculum as well.

“Doctoral studies were also an opportunity for self-improvement and learning. Due to the fact that I had a lot of help from my PhD supervisor and that and so it was a time where I learned very, very much. (...) I mainly focused on writing during my PhD studies. (...) I certainly saw my PhD studies as an introduction to an academic career, but they were also a time for me to develop myself and with which I think I made sure I was going down the right path”. (Alice)

Patricia reverses the proportions presented by Alice:

“From my level it was probably more 60 student, 40 researcher. For me it was a bit more branches to embrace just the modern, contemporary ones that I didn’t have access to when studying”. (Patricia)

Margaret, on the other hand, clearly separates this cycle of training from the structure of her studies, and she does not see the study period as a prelude to an academic career – ‘I wouldn’t have understood it as an extension of my master’s degree.

“I would not conceive of doctoral studies in the category of an extension of a master’s degree, it was a completely different reality for me. (...) there were new challenges, completely different things, (...) that were previously closed to us. But you don’t necessarily have to talk about it in the context of such an opening of some kind of path to an academic career. Not everyone ties their path to a scientific career (...) is simply some kind of stop or some kind of springboard to something. (...) These new opportunities that arise are completely different”. (Margaret)

Emily, to a greater extent, feels like a young scientist, which is related to her relationship with her promoter, who:

“Gives me a very high degree of trust, a lot of independence, gives me a lot, a lot of space to act. He doesn’t impose on me what I have to do, but how he gives me the space to do what I have planned for myself. Hence, independence is probably the key in these proportions, that if I would feel more like a student, well, I associate it more with the fact that someone, however, is hanging over me, so to speak”. (Emily)

However, a completely different approach is presented by other research participants, as is clearly evident in Sophie’s succinct statement. As a doctoral student, Sophie felt she was first and foremost a student. She felt like a young scientist only when she became active in the doctoral student’s circle and during the implementation of team research.

“I mainly felt like a student. (...) And it was only in this circle, when we started trying to do different research, different projects, that’s when I started to feel a little bit like a researcher (...) then I realized that maybe I can have an idea, I can want to test something”. (Sophie)

Daniel’s and David’s reflections follow in a similar direction:

“Certainly, in my opinion, there are a lot of subjects that fit right into this kind of post-master’s study, which are out of the question (...) So practically it generated about three or three days a week of attending classes, as students do, when there is space to write a doctorate. (...) It certainly makes it more difficult to have this multitude of classes, especially during these first two years, where this hourly grid, let’s say such studying is quite intense”. (David)

Daniel, however, sees himself in two roles: that of a student as pursuing a doctoral school program, and that of a young scientist, in a democratic, empowering relationship with his promoter.

“At times I felt like a student, but I think I rather feel like a young scientist, which is largely due to my promoter, to whom I actually owe the most. (...) I feel like a student because of the number of classes I had to sit in a bench and study through. And this was also very problematic, especially at the end of the semester. Especially when we had to prepare accounts, reports and so on. And all of a sudden it turned out that someone came up with a great idea to give us an essay to write for ten pages”. (Daniel)

In contrast, David states:

“Ph.D. schools have imposed a kind of rigor that resembles just studying and is not so much directed toward personal development anymore”. (David)

A more in-depth approach is presented by Thomas, who feels more like a young scientist as a doctoral student; however, his relationship with academic structures is different.

“Functioning in the structures of the university, one can feel that we are students, however, because that’s how we are treated as students, as doctoral students. As if it seems to me from my own impressions of contacts, for example, at various settlements, that we are nevertheless treated differently in this structure, more towards students than scientists or employees. (...) it also depends on the amount of contact and the type of this contact with the promoter. With mine I feel like a young scientist, while in such strictly bureaucratic things related to the University, I am closer to a student”. (Thomas)

“It’s like with guinea pigs. Neither pigs nor from Guinea. Such a saying circulated among us. I certainly felt like a student in such contexts when I had to follow a study program. (...) That I had to pass the year, fulfil all these requirements. (...) I also felt in my relationship with the promoter as a student, but this was probably also due to the specifics of this relationship. (...) On the other hand, as a young scientist, I certainly had the opportunity to participate in various conferences, to prepare publications this made me feel like a young scientist. But it’s more of an introduction to being a scientist for me. Such a feeling that the time of doctoral studies is to aspire to become a scientist. The doctoral study time is my way to achieve that”. (Margaret)

I will also point out a paradox at this point. Although doctoral studies have often been criticised for reducing young scientists to third-degree students, they were, from the statement, conducted by the faculty, so they gained a sense of institutional belonging to the discipline. The doctoral school, on the other hand, was supposed to contribute to the elitisation of doctoral training, yet paradoxically the very name “school” arouses scepticism among its students. They also feel a lack of belonging to both the doctoral community and the faculty/institute/department. Such a problem becomes perfectly evident in David’s statement.

“It is not clear what de facto status to give to this doctoral school, because it is so seemingly a separate institution at the university, a separate sort of department. But on the other hand, the life of doctoral students goes on at the institutes actually. And so we are ostensibly at this doctoral school, and it’s a bit of a hindrance for us, because nothing de facto connects us beyond formalities to the doctoral school. And our life goes on at the Institute. And when it comes to financial issues, for example, the doctoral school doesn’t have money. The institutes have it, but the institutes don’t want to fund us. We are not formally assigned to the Institute in any way. So, my question is what is the doctoral school for in this case? It simply does not serve any such real function at all, because they do not associate us. De facto it only associates us formally, but not realistically”. (David)

## The role of supervisor in scientific development and dissertation writing

The views of the participants in my research from my doctoral studies and doctoral school confirm the results presented above. Thus, Alexandra’s statement strongly confirms the personality dimension of the promoter’s character and the importance of his positive relationship with doctoral students.

“He’s understanding. And I’m missing an adjective, but I mean a person of such actual interest. (...) However, I think that such a distance is needed, so that there one does not get on each other’s head. Also more interested, involved in this doctorate. It also depends on who needs what. I like freedom and free hand. On the other hand, I know that there are some people who like their promoter to check on them every week, because otherwise they can’t get on with their work. On the other hand, I think the key is interest. That the promoter takes an interest. It is known that time varies. Professors also do fifty thousand things at once. There can be no such disappearance for a few months even as some promoters can do. This forbearance is also important, so that he is not so, maybe not so strict, or so dry, so inaccessible, as if from a distance, so distanced, that is, as if we feel so a little uncomfortable, because there is a situation of rigidity of a certain type”. (Emily)

On the other hand, however, in another of her statements, the same person in her statement refers to mentoring as an important feature of the doctoral student’s relationship with the promoter:

“I think the promoter assumes such a role of a mentor more, who takes this doctoral student by the hand and shows him that not always what the doctoral student in his idealized vision has conceived, does not necessarily look like that, and one must sometimes with humility lower one’s head and learn to go through certain things without losing motivation and the will to act. But to lose such motivation is not difficult”. (Emily)

Other study participants, Diana, Thomas and Alice, also refer to the soft skills of the promoter:

“I think openness, first of all, openness. I think to such, to new ideas, as it were, or to ideas of the younger generation, because we often encounter that doctoral students take up topics that are unearthed after several years, their view of these issues takes a completely new picture or direction (...). I think that in a way kindness and forbearance, because we make mistakes and sometimes get lost in our own scientific work, this is also very important in this cooperation. (...) Often during the writing of a doctoral thesis we come up with various, according to us, brilliant ideas, which is not necessarily reflected in reality, in scientific work. But I also think the promoter should be a hard-nosed person who will say that it doesn't make sense and dissuade us from certain kinds of non-brilliant ideas in the future. I think commitment is also important. It's good to have an ideal promoter who won't leave us alone and will help us write the thesis. It's also important to think outside the box – to try to put ourselves in our shoes and understand what we want to convey or what idea we have. I think also treating doctoral students fairly, not favoring anyone when the promoter has several doctoral students. A sense of humor also comes in handy, to make this atmosphere during meetings, relaxed. Different life situations confront us, and such a sense of understanding of this empathy on the part of the promoter is also very important”. (Diana)

“The ideal type would definitely be a patient person, full of kindness. It seems to me that the ideal promoter realizes precisely that this relationship is sort of as Ericsson said, the vehicle that is used to travel the road. Without this relationship, unfortunately, a person is not able to go anywhere. Because he may have and promoter knowledge may have and doctoral student, knowledge and ability, but if this does not go hand in hand in the relationship, in my opinion, then it does not work, well then this vehicle stands on the road and is wrecked. That is, either they both undertake the repair of that vehicle so as to move on. Either or the vehicle needs to be replaced sometimes, that's my opinion”. (Thomas)

“He should have a lot of patience for a young person who is not a scientist, he is learning. He should simply make time, to the best of his ability and, of course, his duties. I also think he should find time for his doctoral student, because the doctoral student probably still needs help and some guidance at this stage. And I think that the doctoral promoter should also be the kind of person who does not clip the wings, who also allows to go scientifically beyond the area in which the promoter himself specializes, (...) does not limit the doctoral student. This common theme of the doctoral student and the promoter is very important. On the other hand, I think that the promoter should orient the doctoral student not only to those areas that he or she deals with. A kind of broad horizon and acceptance is very important”. (Alice)

In the above statements, the complementarity of the various roles of the promoter is evident: guide and mentor, senior railroader, authority. However, Alice goes even further in her statement by stating:

“The promoter’s knowledge is an advantage whereas does [it matter that] he is actually competent in a given topic? I think it is not necessary. (...) I don’t have such a feeling that it is necessary for the doctoral student to finish writing this thesis with a positive result”. (Alice)

In this person’s approach, the emphasis on the doctoral student’s independence in acquiring specific knowledge is evident; the promoter should be a source of content and personality and direction, while knowledge such as this can be found in various types of digital repositories. However, a completely different approach is presented by other research participants, for whom substantive competence and concrete knowledge are of primary importance. Patricia and David believe that, in order to give support to a doctoral student, the promoter must be an expert.

Patricia and David expose the role of:

“a promoter who guides his student, so this. This stage of introduction at least to this broader knowledge, which is already mastered, it comes out as if from the office, because I have rarely encountered somewhere that a completely different topic is conducted by the promoter in doctoral students than the self-guide. He is simply versed in this literature (...), a person with a track record like your professor or [other] promoters”. (Patricia)

“Of course, it’s already such a matter of course that it’s good how this promoter is a specialist, has a lot of knowledge and so on, it’s also somehow how you choose your promoter, so that there’s an overlap with your interests somewhere, so that, you don’t have this feeling that there’s not much to be gained from this relationship”. (David)

In the minds of doctoral students, there is also, of course, the role of an idealized Master. In the experience of my interlocutors, this master promoter is a role model, has the competence to conduct the dissertation and share his scientific experience. In several cases there is a direct reference to this almost mythical figure, although it co-occurs, as in the above statements, with other roles of the promoter.

“Master, because already when deciding on a promoter I wanted to work with a competent person, so to speak, from whom I can learn a lot and get inspiration. (...) In my case, for four years this master-student relationship occurred. As for the advisor, I also consulted at every stage of my scientific work, whether so writing a thesis or scientific development with the promoter. This supervisory relationship also occurred, for example, as he inquired how the writing of the dissertation was going and at what stage I was. So that I think that my contacts with the promoter these three relationships (master, advisor, supervisor) occurred”. (Diana)

“Certainly, from my perspective to the greatest extent there is this relationship of master and student. At least I perceived it that way. There is certainly to some extent this supervisory role, although I don’t know if I don’t project it to myself, but it helps me a lot, so it’s probably ok. There is also this role of such a partner, where in fact also my

promoter shares with me his comments, proposals, solutions (...) I feel such a great respect for my promoter, that's why I perceive the most in this relationship of master student our relationship". (Daniel)

Elsewhere in the interview, however, Daniel states: "this concept of master and disciple is blurring". Daniel, in his relationship with his ideal promoter, refers to both the concept of a master and a person who believes in the potential of a doctoral student:

"Surely the ideal supervisor should find a way to somehow encourage their PhD student to think, to be open-minded, to explore. To, as in that proverb, give the rod and not the fish, to show how to use it. To open up new paths, to discuss, but sometimes also to show, like Socrates: why am I going? And on the basis of Socrates' open-ended questions show those mistakes, difficulties. Sometimes you let yourself go into the deep end to see if this is really it, and sometimes you throw a lifebelt and show where there is still work to be done. (...) I think that the ideal supervisor should be open to suggestions. He or she should give the doctoral student the opportunity to prove himself or herself first and foremost but should also clearly present his or her requirements and expectations of the thesis, and simply enforce them on an ongoing basis". (Daniel)

Thomas, on the other hand, clearly locates his relationship with the promoter in the master-disciple model, but with a strong hint of a democratic arrangement:

"I experience a master relationship. I didn't expect that this is how the relationship with the master can also look like, that (...) however, this relationship can be full of kindness, full of understanding and support, as well as humanity. I did not think that this is how the relationship in the university structure can look like (...) I feel a lot of support of help at the moment. On the other hand, (...) it depends on how I would place the boundaries between an advisory relationship and a collegial one, because when it comes to support, one can indeed, and one can see kindness in both relationships. On the other hand, I would never allow myself to treat a promoter as a colleague or a friend, because this is for me personally somewhere outside of my standards in which I was raised too. (...) whereas in the studies at our doctoral school, it is precisely these relationships that, in my opinion, center around this mastery. Whereas, as I see it, how such an atom, which has precisely this mastery at its center, can be either more in the supervisory direction, or more in the direction of this support, this guidance". (Thomas)

Alice also points to the experience of the master-student relationship:

"For me, the answer is quite clear and and easy. Absolutely describes the promoter in terms of a master (...) because I share with my promoter a passion for writing, for discovering new issues and aspects of the subject matter, looking for details, details. I saw in my promoter a master, because just as for my promoter it is important to write books, texts and that these texts are good and that they are also read, noticed, (...) this is also important for me. The promoter gave me a lot of opportunities for discussion, a kind of freedom, although it is clear that I took all, all comments and all tips very much to heart, and I think that definitely for me the promoter was a master and an important person in the creation of my dissertation. I think that without my promoter, my aca-

demical path and these doctoral studies would not have turned out the way they did. And I definitely see my promoter in the category of a master (...). The role of supervisor, on the other hand, occurred to a small degree, (...) I wasn't overwhelmed by this role of supervisor, I would put it that way, as obviously holding myself to certain standards, deadlines. It was important to me and to my supervisor (...) I saw it as an advantage". (Alice)

The same person adds:

"He played the biggest role. My promoter and working with the promoter confirmed my choice (...) He played such a very important role, in addition to being a champion, he was also a motivator (...) The promoter was the kind of person who saw in me a person who could just complete this doctorate (...) This was very important for me, because I didn't quite believe in it, and in fact there were moments of doubt as to whether I would manage (...) And once again I will repeat that he was open-minded, because this was the most important role he played during the writing of my dissertation, in preparation for the defense, and I owe him a very, very great deal. I remember my consultations very fondly, even though I can say that the consultations were stormy (...) He also allowed me to express myself, to confront certain aspects of my perception of certain issues. (...) It shaped me as a person". (Alice)

Similar experiences are shared by Patricia and Sophie, who also point to the role of the master as dominant:

"I would rate my promoter as a master. Certainly not a supervisor. From this angle, he was such a really very kind promoter. And sometimes, when necessary, he 'gave an earful': don't lash out, calmly, so he was also able to restrain my urges, and this is definitely the role of a supervisor with him is excluded. The first definitely master, senior colleague. advisor. And this kind eye looking with experience". (Patricia)

"A champion for sure, and in fact a champion to this day. Although not from the beginning, because my beginnings were difficult, because first of all I was afraid, and secondly she was very demanding. I had the feeling that I didn't meet these requirements. (...) Mrs. Professor rather in such a favourable way, but nevertheless for many years she maintained formal relations. Only somewhere towards the end of my doctoral studies closer to the finalization of the dissertation somewhere those relations were closer and somewhere more and more threads from private life entered". (Sophie)

For Emily, the promoter is both a master and a senior colleague, which is clear from their partnership:

"I would vacillate between an older colleague and a champion with the advantage of an older colleague. I feel strange thinking of my promoter: my senior colleague. But this is due precisely to the relationship we have, to the fact that he gives me a lot of freedom to act. On the other hand, through his experience, I consider him a master, but I sort of don't want it to sound bad, but I don't draw on his mastery because I'm in a slightly different field. I admire him for what he has done, but I don't draw from it for my research work. (...) I won't say that my promoter didn't motivate me, while there was no

such thing as you have a deadline here. If you don't do it, you're going to get beat. Rather, such motivation came from itself. Maybe in a different way. Maybe it also came from the fact that I didn't need supervision". (Emily)

In turn, Michael shows an unusual relationship with the promoter, who, creating a partnership and collegial relationship, had a problem with maintaining a master-student relationship:

"In my case it was so, that all these roles they blurred a little at the very beginning, when the promoter said to me: let's talk to each other by name, and as if this distance was shortened so much, (...) I also maybe then did not understand the concept of master, what it means to be a master, such a mentor more. On the other hand, master was also so strange to me, because at least to me Master was associated with such scientists, really such on top, (...) who and guides us, supports us, is with us, while here all this was lost and it had negative consequences. (...) She was such an advisor. I could write to her at any time. She also always wrote back to any such inquiry and also corrected. (...) but she also poured a bucket of cold water on me and my colleague. She said that we treated her as such more of a colleague than as such a person to guide us (...). If I were to be a promoter in the future, I would not cross this barrier at all, at least until the doctoral student defends himself. This is important, it seems to me". (Michael)

Consequently, the ideal promoter for Michael is one who sees potential in the doctoral student, while not necessarily having a social relationship with him:

"He is firm, kind, (...) but it seems to me that he should also be such a signpost on the one hand, but also (...) he should not be so busy either, so that there is not this kind of feeling that he is unavailable. (...) So that the doctoral student has this sense of security that he has a super promoter, that he is demanding, but that he can always count on him. On the other hand, it seems to me, this distance is also necessary". (Michael)

In the thinking of doctoral students, a promoter does not need to have more knowledge than a doctoral student in a particular research area. Related to this is the belief that knowledge is still being discovered, and its growth indicates the progress of science. The desirable characteristic of a promoter here is openness to new ideas and faith in the intuition of a doctoral student who is venturing into paths previously unexplored. At the same time, however, the promoter plays the role of a mentor in this process, who can supervise the doctoral students work in a certain way, providing valuable guidance and supporting him with his own experience and expertise in research theory and methodology. The promoter represents a "great intellectual" who, from a "bird's-eye view", is able to determine the "state and directions" of doctoral research and is also an excellent personality.

This opinion is also evident in Thomas and Emily's statement:

"So more in the direction of soft skills, I think. And not necessarily, even in the direction of knowledge of say a given direction. Because of the availability of knowledge as it is

these days. And the very fact that the promoter is a professor. It seems to me that he has such analytical skills that it does not matter with what type of knowledge. Well, you know, of course, in a particular discipline, but he has such analytical skills that he can distinguish whether the doctoral student is really writing on the topic or not, does this work make sense? So that's why I would go more towards just those soft skills, those relational skills". (Thomas)

"It would be a bit dangerous if the promoter lived with such a belief that he surely knows better, because such stories usually end badly. As if communication and relationship is important. That is, to say also: I don't know about this subject, I don't know. My promoter can afford it. It has to be a master-disciple relationship, but so that she has such a bit of partner colour. And is it very important for me that my promoter has more knowledge?" (David)

"The promoter has this methodological knowledge. She knows more how the scientific world, the academic world works. And I think this is the clou. It would be pointless, in my opinion, if a doctoral student wrote about something about which the promoter already has knowledge and even more knowledge than him, because then what would be the point of a doctorate? And so we bring some new, not even so much an element, but a lot of novelty. It's as if we can inspire each other. And I think that's the clou of it all. Such a change, a change in thinking of what came before. The promoter, the professor is the alpha and omega and no one has more knowledge". (Emily)

"And is it at all possible for the promoter to have some greater knowledge every time, if sometimes there are some such topics that are very alternative? I think it's impossible for him to deal with all this. And I don't think he has to have more knowledge; I just think he should be more curious about the topic. And so, then he can also develop with this doctoral student. If one decides on this topic, it will necessarily develop and support a little somewhere". (Sophie)

Daniel puts this problem in a broader context:

"Surely the ideal promoter should find a way to somehow encourage his doctoral student to think, to be open-minded, to explore. To, as in that proverb, give the rod and not the fish, to show how to use it. To open new paths, to discuss, but sometimes also to show, like Socrates: why am I going? And on the basis of Socrates' open questions show those mistakes, difficulties. Sometimes let go to such deep water to see if this is actually it, and sometimes throw a lifebelt and show where it's worth further work. (...) I think the ideal promoter should be open to suggestions. He should give the doctoral student the opportunity to prove himself, first of all, but he should also clearly way to present their requirements and expectations of the work, and simply enforce them on an ongoing basis". (Daniel)

The ideal promoter has the knowledge and competence to conduct a doctoral dissertation. However, as I wrote earlier, it does not have to be expert knowledge of the subject of the doctoral dissertation – in a detailed context. Among the competencies of the promoter appear patience, time devoted to the doctoral student, and understanding. He or she must also be open to new ideas, to the

doctoral student's ideas that go beyond the promoter's interests, but which are relevant to the development of scientific thought, research, or the discipline more broadly. He must not "clip the wings".

## Conclusion

Being "immersed" in the reality of doctoral studies – in my roles as associate dean or supervisor – I feel an integral part of it. On the other hand, as a researcher, I look outside of it, as it were, with full awareness that gaining any objective insight is impossible. The reality of doctoral students and their identities is a social construction determined by the formal-legal, institutional, biographical, and personal framework. In embarking on this research, I assumed to some extent that doctoral students and doctoral schools hold, at least to some extent, different views regarding science, scientism and scientific development, doctoral writing, the role of institutional training, and the relationship with the promoter. Indeed, establishing doctoral schools was heralded as a "break with the past," a "breakthrough". Doctoral schools were to be more elitist than doctoral studies and a platform for "scientific excellence" and "global internationalization". They were to be one of the pillars of Polish higher education and science reconstruction. My research did not confirm this thesis; the views of the research participants coming from the doctoral study were very similar in their content, evaluations, and emotional colouring to the views of the doctoral school students. It turns out that not much has changed. Does it mean the failure of the doctoral school? I would not see it from that perspective. As was the case with the doctoral program, the core of the new reality associated with the doctoral school is the preparation of the doctorate. This gives meaning to the institutional location in both cases. Moreover, this is an optimistic conclusion.

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## Chapter 3.

# Harm reduction after the time of pandemic – new micro-policy perspectives at the level of educational organisations

## Introduction

The coronavirus disease 2019 (COVID-19) has had a significant impact on how people function from the perspective of individuals, as well as small (for example, families or workplace communities) and large groups (inhabitants of particular regions) around the world. The spread of severe acute respiratory syndrome coronavirus 2 (SARS-CoV-2) and its consequences (COVID-19 disease) have become a challenge for the modern world and modern management in work environment. The pandemic caused much chaos, and as such, it triggered the need to deal with the crises of both entire societies and individuals. The global threat to the population's health has resulted in various adaptive responses and ways of coping with stress by the society, groups, or individuals experiencing it. During the first wave, 186 countries implemented varying degrees of restrictions on population movement to slow the spread of the disease and prevent health systems from becoming overwhelmed. According to UNICEF, these restrictions amounted to lockdowns in 82 countries<sup>130</sup>. Governments around the world faced the common challenge of easing lockdowns and restrictions while balancing various health, social, and economic concerns.

In all waves, the COVID-19 pandemic prompted the governments of many countries to introduce numerous restrictions, close some sectors of the economy, and temporarily switch to remote or hybrid operations. These solutions used at the beginning of the pandemic are concerned to be bivalent<sup>131</sup>. This is because, on the one hand, they have introduced a partial economic crisis in industries such as aviation, gastronomy, hotel, fitness, events, and culture, but they have also created the conditions for the dynamic development of industries based on Internet

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130 UNICEF *Responding to COVID*, 2020. Available at: <https://www.unicef.org/reports/responding-to-covid-19> (access: 12.07.2023).

131 Ö. Açıkgöz, A. Günay, *The early impact of the Covid-19 pandemic on the global and Turkish economy*. "Turkish Journal of Medical Sciences", 50, 2020, pp. 520–26.

communication and forced the development of many companies toward increased online services in all industries<sup>132</sup>.

This situation has not only changed the way many companies operate by forcing them to implement hybrid or fully distant work but also the methods of communication, training, and employee management (control, monitoring, and support) within companies. The processes taking place on global and local scales are very complex and discussing all their possible consequences is futurology. However, one thing is certain, modern managers have to deal not only with (macro and micro) economic and social risks, they will also have to deal with the risks associated with individual psychological processes of coping with this situation in their teams.

The chapter focuses on pandemic stress and its consequences for educational organisations during re-adaptation to life after the pandemic. It presents important and useful concepts of coping with stress at different organisational levels. The presented operationalisations of the pandemic stress approaches indicate that the way in which the pandemic was experienced might involve various reactions. Moreover, the chapter discusses consequences of the pandemic stress which should be treated as challenges for education from the perspective of the members of educational organisations and from the perspective of their functioning. Furthermore, it is pointed out that coping with the consequences of pandemic experiences involves not only damage assessment but also the measures taken to reduce damage. In this perspective, proposals and strategies for building resilience at the level of educational organisations are presented. Resilience is treated as an individual resource that includes self-control, self-efficacy, resourcefulness, sense of humour, valuation and coping with events. Building resilience goes through stages, which have been described in the chapter from the perspective of educational organisations and their members.

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132 H. Chutipimon, A. Thipsunate, A. Cherdchim, B. Boonyaphak, P. Vithayasirikul, P. Choothong, S. Vichathai, P. Ngamchaliew, P. Vichitkunakorn, *Effectiveness of Innovation Media for Improving Physical Distancing Compliance during the COVID-19 Pandemic: A Quasi-Experiment in Thailand*. "International Journal of Environmental Research and Public Health", 17, 2020, p. 8535.

## Stress and crisis in organisation functioning

The global epidemic caused by SARS-CoV-2 has brought about deprivation and a sense of danger all over the world. The World Health Organization (WHO) called it a pandemic<sup>133</sup>. For this reason, we can use the term “pandemic stress”, i.e. stress related to this particular situation. According to the definition, a pandemic is a state of threat to the health and sense of security and the related changes in the living conditions of individuals.

It is considered an additional stressor in the environment. In this case, this stress, in line with the concept of salutogenesis by Aaron Antonovsky can be classified as a stressor<sup>134</sup>. According to the discussed concept, not every stressor causes a state of stress or worsens the health level of an individual or a group. What happens next is related to the interaction of the remaining factors included in the health model. Apart from stressors, these are the generalized resources, behaviors, and lifestyles, as well as the sense of coherence. Generalized resistance resources (GRRs) are the properties of an individual (biological, psychological ones) and the properties of the sociocultural context (group features, culture and religion features, level of economic development). The ways of responding to a given situation result from the resources available to an individual. As different governments assessed the situation differently in all phases of the pandemic, their choices for the specific coping paths varied. Thus, we could observe British, Swedish, Finnish, Australian, Chinese, American, Austrian, Italian, or Polish reaction models. They differed in the number and depth of the restrictions applied, for example, in relation to social life or goals (achieving herd immunity, preventing the collapse of the healthcare system, searching for a vaccine, reducing number of infections as quickly as possible).

Another group of health determinants involves behaviour and preferred lifestyles. To some extent, this group of factors is connected to GRRs because many behaviours are related to creating conditions that are conducive to experiences that develop resources and the sense of coherence. The most important individual group factor playing a role in the process of maintaining health is the sense of coherence (SOC), which is the general orientation attitude of an individual expressing permanent and dynamic beliefs in the predictability and rationality of the world and one's life situation.

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133 WHO, *COVID-19 Timeline*. Available at: [https://www.who.int/emergencies/diseases/novel-coronavirus-2019/interactive-timeline?gclid=Cj0KCQiAqo3-BRDoARIsAE5vnaKC1roIzd9tMLymdDnijDMDuTc14c-YRlqEzELh5Qd-cxeTMWaLpR8aAlwCEALw\\_wcB#event-115](https://www.who.int/emergencies/diseases/novel-coronavirus-2019/interactive-timeline?gclid=Cj0KCQiAqo3-BRDoARIsAE5vnaKC1roIzd9tMLymdDnijDMDuTc14c-YRlqEzELh5Qd-cxeTMWaLpR8aAlwCEALw_wcB#event-115) (access: 10.06.2023).

134 A. Antonovsky, *Poczucie koherencji jako determinanta zdrowia*, [in:] *Psychologia Zdrowia*, (eds.) I. Heszen-Niejodek, H. Sęk, PWN, Warszawa 1997, pp. 206–31.

Therefore, from the social perspective, pandemic stress, in accordance with the concept of salutogenesis, results primarily from the imbalance between the challenges faced by an individual (e.g. social isolation, remote work, home education, loss or reduction of income, lack of information, previous obligations and lifestyle, vision of the world) and resources allowing the individual to deal with them (e.g. the unpreparedness of the health system, unclear market situation, ongoing processes of disinformation, lack of proven procedures and methods of conduct, no vision of future accidents).

The environmental approach defines stress as a change, quantifying it as the number and magnitude of key life events experienced by a person in a given time period<sup>135</sup> [8]. As mentioned above, the social restrictions, with ever more present economic difficulties (e.g. unemployment) and feeling uncertain about the future, have been proposed as additional important stressors<sup>136</sup>.

In the classic concept of stress by Richard Lazarus and Susan Folkman, a new situation violating the current state of equilibrium is cognitively assessed as optimal, burdening, or exceeding the individual's abilities, and this determines its consequences and the methods of coping<sup>137</sup>. Cognitive assessment goes through two stages. The first one is the so-called primary appraisal, during which, an individual recognizes the nature of the transaction and their capabilities in it. The emotional process is inherent to the stress transaction and, usually, the first emotions appear as a result of the primary assessment. Emotions can be of various types: regret, sadness, fear, hope, enthusiasm, joy, relief, jealousy, guilt, and other. When an interaction is considered stressful (i.e. losses, threats, or challenges), a secondary appraisal process takes place. This stage of assessment involves the possibility of taking actions that are aimed at removing the cause of stress or mitigating its consequences, and, in the case of a challenge, achieving benefits. The primary and secondary stages of evaluation are interrelated and interact with each other. The secondary assessment can change the primary assessment from hazard to challenge and vice versa. The individual, being aware of the disturbances in the adaptive balance and threats, as well as experiencing intense and often unpleasant emotions, will strive to change this situation. Researchers have defined the activity that is directed at change as coping with stress, the function of which is coping with the perceived problem and regulation of emotions (appeasing the unpleasant emotional states and finding meaning and sense). It should be pointed out that both the assessment of the situation and the

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135 M. S. Hagger, S. R. Smith, J. J. Keech, S. A. Moyers, K. Hamilton, *Predicting Social Distancing Intention and Behavior During the COVID-19 Pandemic: An Integrated Social Cognition Model*. "Ann Behav Med.", 54 (10), 2020, pp. 713–727.

136 R. S. Lazarus, S. Folkman, *Stress, Appraisal, and Coping*, Springer, New York, 1984, pp. 15–25.

137 J. Terelak, *Stres Życia*, UKSW, Warsaw 2017.

adopted aim of the actions do not have to be realistic, effective, or conscious from the observer's point of view<sup>138</sup>.

Stress theorists point to another useful approach. This is the conservation of resources theory (COR). Stevan Hobfoll<sup>139</sup> pointed out that in the face of stress, people use their available resources to adapt successfully, which involves acquiring resources, maintaining them, and protecting themselves against the loss of resources, which is often referred to as investing resources. Resources are objects (material resources), conditions (health, place of residence), personality traits, the energy of an individual, and its sources. They are directly or indirectly valued and needed by an individual to survive, or they are used to obtain new resources. Therefore, in COR, psychological stress is a reaction to the environment in which there is a threat of the loss of resources, the loss of resources has already occurred, or the expected profit has not been achieved, and resources have been invested, which also means a loss. In this model, in the case of resource management, which conditions effective coping with stress, there are two cycles: profit and loss. They form a spiral, known as the profit and loss spiral. Losses are very acute as people who do not have much to invest only try to protect their remaining scarce resources. This often leads to passive behaviour and the chronic effects of stress. Moreover, scarcity of resources increases the risk of loss and entails further losses of resources. It seems particularly important to carry out research on people and groups that are short on resources and exposed to their loss, including people at risk of occupational burnout, loss of health, social exclusion, and addictions. Resource-rich people who are in the profit spiral protect and multiply their resources, and in a stressful situation, they are able to reverse the emerging spiral of losses and make a profit<sup>140</sup>.

The presented operationalizations of the pandemic stress approaches indicate that the way in which a pandemic is experienced may involve various reactions. It will not be a challenging situation for everyone; for some, it may cause a surge of initiative and fascination with emerging opportunities. However, what is worth emphasizing in each of the approaches is that individual and social resources are important and they are created thanks to both the efforts of individual and their living environment, in this case, the education organisations. The consequences

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138 S. Folkman, J. P. Moskowitz, J. T. *Positive affect and meaning-focused coping during significant psychological stress*, [in:] *The Scope of Social Psychology. Theory and Application*, (eds.) M. Hewstone, H. Schut, Psychology Press, New York, 2008, pp. 193–208.

139 S. E. Hobfoll, *Conservation of resources. A new attempt at conceptualizing stress*. "American Psychologist", 44, 1989, pp. 513–24.

140 Idem, *Stres, Kultura i Społeczność. Psychologia i Filozofia Stresu*, GWP, Gdańsk 2006.

of the pandemic stress should be treated as challenges for education environment<sup>141</sup>.

Now some examples of consequences and factors important in coping with pandemic stress at the individual level. At the beginning, many studies (e.g. in Poland, Georgia, Russia, Turkey, Germany, Albania, Romania, Great Britain and China) noticed increased stress levels and increased anxiety and sadness syndromes<sup>142</sup>. The research also noted an increased level of frustration and the feeling of overload and difficulty. These results were similar for both the general population and for those in quarantine. However, the first variables differentiating the experiences of the COVID-19 pandemic appeared in this respect. They were gender, education, income, and place of residence. Furthermore, in the Chinese population, female gender, student status, and health problems were associated with higher levels of stress and the symptoms of anxiety disorders or depression.

Elżbieta Hornowska distinguished four groups of individuals who differed in terms of their coping strategies<sup>143</sup>. What is important is that a higher level of stress was displayed by highly task-oriented and highly distant people. In the latter group, high sense of loss was noted. The lowest level of stress was shown by people who saw some sense in the events that appeared (the so-called “reconciled” group).

Subsequent studies indicated that resilience and social support were correlated with each other and reduced the severity of anxiety about the coronavirus<sup>144</sup>. Fear attitudes toward the pandemic were also positively associated with aspirations regarding power, life stabilization, and activism, as well as belief in the unpredictability of events; they were negatively associated with the importance of faith/religion in life and having an exciting life, as well as with life satisfaction.

Summarising, in global monitoring of mental health, the OECD has identified an increase in mental health problems, for example, anxiety and depression, compared to the pre-COVID-19 time. Further on, it reported mental health

141 S. K. Schäfer, L. Becker, L. King, A. Horsch, T. Michael, *The relationship between sense of coherence and post-traumatic stress: A meta-analysis*. “European Journal of Psychotraumatology”, 10, 2019, p. 1562839.

142 C. Wang, R. Pan, X. Wan, Y. Tan, L. Xu, C. Ho, R. Ho, *Immediate psychological responses and associated factors during the initial stage of the 2019 coronavirus disease (COVID-19) epidemic among the general population in China*. “International Journal of Environmental Research and Public Health”, 17, 2020, p. 1729.

143 E. Hornowska, J. Paluchowski, T. Jadczyk-Szumilo, E. Szumilo, *Pierwsze dni Pandemii COVID-19 – Jak Sobie Radziliśmy*, [in:] *Proceeding*, (eds.) E. Hornowska, J. Paluchowski, T. Jadczyk-Szumilo, E. Szumilo UAM, Poznań, 2020. Available at: [https://www.researchgate.net/publication/343018845\\_Pierwsze\\_dni\\_pandemii\\_COVID-19\\_-\\_jak\\_sobie\\_radzilismy\\_ze\\_stresem\\_Raport\\_z\\_badan.pdf](https://www.researchgate.net/publication/343018845_Pierwsze_dni_pandemii_COVID-19_-_jak_sobie_radzilismy_ze_stresem_Raport_z_badan.pdf) (access: 10.06.2023).

144 S. Skalski, P. Uram, P. Dobrakowski, *Lęk w koronie*. Paper presented at the National Scientific e-Conference Experiencing the COVID-19 Pandemic in Poland, Poznań 2020.

improving and worsening together with the waves of COVID-19. The peaks of mental distress are closely correlated with peaks in COVID-19 deaths, and periods when pandemic control measures were the strictest. The COVID-19 pandemic affects not only the negative aspects of psychological response, such as anxiety, but also the positive ones, such as mental well-being, resilience, life satisfaction, and happiness<sup>145</sup>, engagement to work and organisation, work satisfaction<sup>146</sup>.

## From crisis management to management in time of insecurity – challenges for leaders

COVID-19 was described as an acute crisis. It means that some circumstances and consequences of spreading the infection were beyond the control of institutions and leaders. During crisis situations leaders had to cope with an unexpected and ambiguous reality. They had to present the complex scenarios (offensive and defensive) that were to ease the situation and give more time for preparation of an adequate response<sup>147</sup>.

Crisis management is a situation-based management system that includes clear roles and responsibilities and processes related organisational requirements company-wide. The response shall include action in the following areas: crisis prevention, crisis assessment, crisis handling and crisis termination. The aim of crisis management is to be well prepared for crisis, ensure a rapid and adequate response to the crisis, maintaining clear lines of reporting and communication in the event of crisis and agreeing rules for crisis termination. Alan Hilburg, a pioneer in crisis management, defines organizational crises as categorized as either acute crises or chronic crises. Hilburg also created the concept of the Crisis Arc<sup>148</sup>. Erika Hayes James identifies two primary types of organizational crisis<sup>149</sup>. James defines organizational crisis as “any emotionally charged

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145 N. Z. Bakkeli, *Health, work, and contributing factors on life satisfaction: a study in Norway before and during the COVID-19 pandemic*. “SSM – Population Health”, 14, 2021, p. 100804. Available at: <https://doi.org/10.1016/j.ssmph.2021.100804> (access: 22.06.2023).

146 S. X. Zhang, N. Tower, *Unprecedented disruptions of lives and work – A survey of the health, distress and life satisfaction of working adults in China one month into the COVID-19 outbreak*. “Psychiatry Res.”, 2020, 288, p. 112958.

147 E. James, L. P. Wooten, *Leadership as (un)usual: How to display competence in times of crisis*. “Organizational Dynamics”, 2005, 34 (2), pp. 141–152.

148 M. Alessandro, M. Heikkilä, *Business continuity in the COVID-19 emergency: A framework of actions undertaken by world-leading companies*. “Business Horizons”, 64 (5), 2021, pp. 683–695. Available at: <https://doi.org/10.1016/j.bushor.2021.02.020> (access: 20.06.2023).

149 T. T. Le, V. K. Nguyen, *Effects of quick response to COVID-19 with change in corporate governance principles on SMEs’ business continuity: evidence in Vietnam*. “Corporate

situation that, once it becomes public, invites negative stakeholder reaction and thereby has the potential to threaten the financial well-being, reputation, or survival of the firm or some portion thereof<sup>150</sup>.

COVID – 19 was definitely a sudden crisis. It means that it occurred without warning and beyond an institution's control. Sudden crises are usually situations for which the institution and its leadership are not blamed. So the crisis management consists of different aspects including:

- Methods used to respond to both the reality and perception of crisis.
- Establishing metrics to define what scenarios constitute a crisis and should consequently trigger the necessary response mechanisms.
- Communication that occurs within the response phase of emergency-management scenarios.

Crisis management strategy (CMS) is corporate development strategy designed primarily to prevent crisis for follow-up company advancement. Thus, CMS is synthesis of strategic management. It includes projection of the future based on ongoing monitoring of business internal and external environment, as well as selection and implementation of crisis prevention strategy and operating management. This includes current status control based on ongoing monitoring of the internal and external environment, as well as crisis-coping strategy selection and implementation<sup>151</sup>.

Successfully managing a crisis requires an understanding of how to handle a crisis – starting before it occurs. Crisis situations can overwhelm even the most experienced leaders, presenting unexpected, complex scenarios that evolve at a fast pace and in several directions. Even in cases in which contingency plans have been prepared, those plans need to be adjusted to respond to rapidly changing circumstances. Fortunately, there are tools and perspectives leaders can use to help their organizations weather difficult times. By building trust, managing fear, and encouraging a sense of duty and community orientation, any leader – whether in business, government, or the non-profit sector, and in organizations big and small – can better navigate the difficult path of crisis management. James's research demonstrates how leadership competencies of integrity, positive intent, capability, mutual respect, and transparency impact the trust-building process by:

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Governance”, 22 (5), 2022, pp. 1112–1132. Available at: <https://doi.org/10.1108/CG-09-2021-0334> (access: 20.06.2023).

150 E. James, op. cit., p. 141.

151 R. Dorczak, M. Farnicka, I. Nowosad, *Dilemmas in Managing the COVID-19 Crisis*. “Risks”, 9, 2021, pp. 52021–80. Available at: <https://doi.org/10.3390/risks9050080> (access: 20.06.2023).

- Signal detection,
- Preparation and prevention,
- Containment and damage control,
- Process of recovery
- and as an output of the experience- Learning.

The above guidelines indicated by crisis management specialists have their references in psychological knowledge. The strategy presented above is similar to the strategy of building Organizational Resilience, which consists in the ability of an organization to anticipate, prepare for, respond and adapt to incremental change and sudden disruptions in order to survive and prosper. In other words, resilience refers to both the process and the outcome of successfully adapting to difficult or challenging life experiences (APA). It is having the mental, emotional, and behavioural flexibility and ability to adjust to both internal and external demands from the point of view of an individual and an organisation<sup>152</sup>.

There are several stages of building this resilience. The first is responding to a crisis, which is mainly characterized by emotional reactions and requires the introduction of rigid procedures. The second stage involves creating a sense of security in order to launch the processes of detection and evaluation of the identified facts. In this phase, in which feelings of uncertainty and unpredictability are already recognized, in order to stop chaos and blurring clear-cut rules, which in turn leads to loss of trust, breaking interpersonal ties and disintegration of communities, the aim is to create an environment called “a community of trust” (the culture of trust). For this purpose it is important to:

1. remind and refer to common values – values practiced at work have a wider reach, their meaning goes beyond work and school;
2. share mission or goal – implementation of common goals, not personal ones, becomes more important;
3. have open and genuine leadership – understood as the leader’s inclination to show trust in other employees – broadening the scope of leadership;
4. orientate toward consensus – in a culture of trust, employees are more willing to contribute to the achievement of common goals, otherwise they may feel forced to carry out common tasks;
5. feel enjoyment derived from work – employees are aware that mistakes and failures are accepted, so they are not afraid to admit them;
6. introduce the atmosphere of joy – it is associated with satisfaction with performed tasks, work can be a fun place for everyone when employees are open to cross intellectual boundaries (i. e. ideas, concepts);

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152 APA, *The Road to Resilience*, 2014. Available at: <https://advising.unc.edu/wp-content/uploads/sites/341/2020/07/The-Road-to-Resiliency.pdf> (access: 20.06.2023).

7. create perspectives and willingness to develop and learn rather than look for errors – avoid focusing on errors and failures, as this approach fails to nurture openness, trust and continuous development of employees;
8. introduce honest and authentic conversations – the culture of trust is fostered where honest communication takes place, and information is not hidden in horizontal (within teams) and vertical relationships (in the subordinate-superior relationship).

This stage builds security and also renews the commitment of the members of the organization because it restores contact and gives a real sense of belonging, which becomes a resource inherent not only in the organization but also in everyday activities and becomes a resource available to every member of a given organization. The third stage is integration and reflection which allows one to integrate levels of experience, enable positive narratives and expectations, and develop effective coping strategies. At the level of organisation the third stage involves creating resources that are important from the perspective of ever-changing conflict environment, and the expectations related to the possibility of early conflict detection. This includes:

1. the reflection on the current understanding of the strategy of working with conflicts;
2. the operating efficiency of organizations;
3. co-ordination and integration of work in terms of increasing the existing resources of organizations and individuals working in the peace-building area and increasing efficiency;
4. improved use of resources of adequateness of actions suited to a given cultural context. In our opinion, these are the most important areas to be developed and supported in the training of police and other peacekeeping or peace-building personnel.

## **Towards new micro-policy of organisations: building the resilience and strength of organisations**

Besides personal factors, this chapter also discusses the concepts and resources created by organizations. Approaching the current situation as a stressor that changes the context of work and the functioning of an organization makes it possible to undertake adequate resource management strategies in order to avoid a spiral of losses. This can be achieved by activities that are based on strength-

ening and mobilizing resources at many levels of the organization: meso-level, micro-level, and self-management<sup>153</sup>.

From the European perspective it is worth underlining the work in the research programme “Una.Resin Work Package 3 Una Europa Strengthening Human Capital” co-led by the Jagiellonian University in Krakow (JU), University of Edinburg, Université Paris 1 Panthéon-Sorbonne, and Universidad Complutense de Madrid. According to the Grant Agreement the aim of the project was to build a broad platform to take the first steps towards Una Europa Strategy for Strengthening Human Capital<sup>154</sup>. The project focused on collaboration between universities in Europe in order to increase the transnational cooperation, strengthen careers, improve digital transition and access to excellence, as well as increase global competitiveness. The authors present two ways of strengthening the output of educational organisation: evolutionary and revolutionary.

The “evolutionary way” includes:

- clear definition and communication of the existing development paths;
- change in the assessment system towards qualitative criteria, emphasising the importance of cooperation in interdisciplinary teams;
- development of support systems addressed to different groups of beneficiaries (systems which are focused on a uniform group always lead to negative outcomes);
- differentiation of the evaluative and developmental aspects of performance assessment;
- support for all participants of organisation in interpreting their current situation and making long-term developmental decisions (coaching / mentoring).

The “revolutionary way” includes:

- competence-based description of activities;
- an evaluation and development system focused on qualitative analysis of competencies and strengths of the members of organisations;
- diversification of developmental activities in relation to tasks given and in connection to individual achievements;
- adoption of individual development plans with the support of a coach / mentor / advisor.

153 A. Farazmand, H. Danaeefard, *Iranian Government’s Responses to the Coronavirus Pandemic (COVID-19): An Empirical Analysis*. “International Journal of Public Administration”, 44 (11–12), 2021, pp. 931–942. Available at: doi:10.1080/01900692.2021.1903926, (access: 21.06.2023).

154 Una Europa for a European inter-university R&I eco-system, *Report*, Grant agreement ID: 101017416. Available at: <https://cordis.europa.eu/project/id/101017416/results> (access: 20.06.2023).

Practically, from the organisational perspective we still talk about values and communication which were needed to collaboration. It is worth emphasising that the research in that area showed that both (evolutionary and revolutionary) approaches exist in the public sector organizations (in many universities and high schools)<sup>155</sup>.

Creating school micro-policy is closely related to development planning, adopting a specific operating strategy in accordance with the vision accepted by the school community. Building resilience at this level is one of the content of creating school micro-policy. However, this seems to be an area where naturally occurring conflicts and confrontations between individuals and groups, typical in the school environment, overlap with the lack of preparation, which is inadequate to contemporary needs, experience and habits, and with information chaos resulting from the rapid growth of knowledge resources<sup>156</sup>. In addition, new trends aimed at school development bring many ambiguities. When analyzing the recommendations from previous research, one can find key recommendations for shaping specific types of behaviour at that level marked by seven key features. When analysing the recommendations from the already conducted research, one can indicate key recommendations for shaping specific types of behaviour characterised by some key features<sup>157</sup>:

- Kindness – confidence that others will act in your best interest
- Competence – knowledge and skills
- Honesty – consistency between words and deeds
- Doing what is right and demonstrating commitment to shared beliefs or values
- Openness and transparency – sharing information and transparency of one’s own activities or plans
- Mindfulness – concern for others
- Reliability – predictability of behaviour and confidence that needs will be met
- Respect – recognizing the value of other people and showing it through listening and reflection.

There is no doubt that, by implementing the above strategies, managers can be pivotal to ensuring that their organisations can succeed in the “new normality”.

155 M. Farnicka, V. Kosiková, *Modele edukacji włączającej w wybranych placówkach oświatowych w Czechach-edukacja włączająca a kultura organizacji*. “Annales Universitatis Mariae Curie-Skłodowska”, 36 (1), 2023, pp. 45–61.

156 I. Nowosad, *Zaufanie w rozwoju szkoły. Możliwości i tożsamość w czasie pandemii*, [in:] *Drogi i bezdroża edukacji w okresie pandemii Covid-19*, (eds.) R. Bera, S. Byra, N. Nyczkało, Uniwersytet Marii Curie-Skłodowskiej, Lublin 2022, pp. 567–579. Available at: <https://wydawnictwo.umcs.eu/produkt/5501/drogi-i-bezdroza-edukacja-w-okresie-pandemii> (access: 15.07.2023).

157 I. Nowosad, *Przywództwo i zaufanie w środowisku szkolnym. Uwagi na kanwie rozwoju szkoły*. “Studia Edukacyjne”, 52, 2019, pp. 173–189.

Resilience is treated as an individual resource that includes self-control, self-efficacy, resourcefulness, sense of humour, valuation and coping with events. From the other perspective, the way of coping with the implementation of developmental tasks is combined with the process of building resilience and it is connected with well-being<sup>158</sup>. It turns out that not only resilience but also gender, educational background, and place of residence are important in coping with pandemic stress<sup>159</sup>. The research revealed the differences between males and females in coping, the importance of closeness and a sense of belonging to an organization, as well as the importance of the year of study at the time of the outbreak of the pandemic, for coping processes both from the individual perspective and functioning in the organization (achievements). It should be emphasized that significant relationships were also found between the support provided to individuals by educational organizations (here: the university) and mitigating harm caused by COVID-19 (i. e. reducing anxiety, symptoms of depression and withdrawal, and above all, strengthening involvement in learning and achievements)<sup>160</sup>.

From the perspective of self-management in building resilience, it is possible to indicate specific methods of taking care of oneself. They include the development of individual skills, providing information on the ongoing process of reaction to reality; balancing individual, isolated work with meetings of groups and teams (online). In terms of evaluation, competencies should be appreciated, a space for innovation should be created and flexible approaches to tasks must be allowed. How to put it into practice? A day/week plan must be developed. When planning, it is important that rituals are included. Everyone should also have an influence on their daily schedule; therefore, it is worth drawing up a plan together.. The specific time frame for its implementation should always be given:

- Creating a place and time to talk about needs.
- Report your needs and listen.
- Creating a place and time for ongoing communication. Regular meetings that are scheduled quite often, for example, once a week, are important.
- Maintaining contact. Due to our isolation, we feel lonely; therefore, it is especially important to maintain contact at a specific time with people who speak your language and who can comfort and support you.

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158 K. Connor, J. R. Davidson, *Development of a new resilience scale: The Connor-Davidson Resilience Scale (CD-RISC)*. “Depression and Anxiety”, 18, 2003, pp. 76–82.

159 R. Prowse, F. Sherratt, A. Abizaid, R. L. Gabrys, K. G. C. Hellems, Z. R. Patterson, R. J. McQuaid, *Coping With the COVID-19 Pandemic: Examining Gender Differences in Stress and Mental Health Among University Students*. “Front. Psychiatry”, 12, 2021, p. 650759.

160 M. Versteeg, R. F. Kappe, C. Knuiman, *Predicting Student Engagement: The Role of Academic Belonging, Social Integration, and Resilience During COVID-19 Emergency Remote Teaching*. “Front. Public Health”, 10, 2021, p. 849594.

- Accepting reality and reorganizing the current lifestyle to one that includes many remedial behaviours (avoiding alcohol and other drugs, watching less news, looking for information only from reliable sources (WHO, government agencies) and preferably not more than once a day, keeping your distance, having proper diet, playing sports, developing hobbies).
- Thinking that you are in a good place at a good time – creating a positive narrative is important. One should look at the events from a broad perspective of one’s current values and goals.

## Conclusions, implications and future directions

The chapter presents the current state of knowledge about the factors that help to protect and build resources in a pandemic stress situation<sup>161</sup>. The main factors include the sense of meaning (events and the perspective related to faith), no sense of loss, resilience, receiving social support, and satisfaction with life so far. The main factors associated with the feeling of greater discomfort in this situation are also distinguished. It was much more difficult for females, parents, and people running a household of at least two people. Supportive and disruptive behaviours were also revealed. We will still be dealing with the situation of uncertainty and the post-pandemic stress related to the necessary re-adaptation to new living conditions for some time, therefore, we should consider a possible model of protection and creation of resources in organizations – resilience. The undertaken actions would be aimed at minimizing the effects of the psychological costs, which may be manifested in the form of increased anxiety, depression, or frustration reactions in the form of passivity, apathy or anger, and aggressive or provocative behaviour<sup>162</sup>.

It can be assumed that the experience of the COVID-19 pandemic put all educational institutions in a situation that no country could ignore. It turned out that in the long-term, experiencing risk and dealing with it is an everyday reality in which greater attention should be paid to interactions from all levels of the organization’s functioning. The pandemic experience brought:

- increased awareness of threats and uncertainty risks in managing organizations,

161 R. P. Rajkumar, *COVID-19 and mental health: A review of the existing literature*. “Asian J Psychiatr.”, 52, 2020, p. 102066.

162 M. Vansteenkiste, R. M. Ryan, *On psychological growth and vulnerability: Basic psychological need satisfaction and need frustration as a unifying principle*. “Journal of Psychotherapy Integration”, 23 (3), 2013, pp. 263–280. Available at: <https://doi.org/10.1037/a0032359> (access: 18.06.2023).

- increased awareness of the importance of stress and its side effects for organizations (for example, related to the lack of clarity of the situation, which causes isolation, a sense of lack of purpose and belonging, and weakening the self-management of its members),
- increased awareness of the importance of individual and generalized resources in entire organizations,
- implementation of procedures related to harm reduction, which at the same time build the resilience of the organization.

Due to the fact that the pandemic was a global and common experience to all people living in this period of 2019–2021, in a way the world has become a global village where we have similar experiences and know similar universal strategies. Therefore, certain ideas that were earlier undermined have become strategies for the functioning of educational organizations<sup>163</sup>. It can be noticed that in educational organisations the emphasis has been shifted from monitoring and controlling the effects to understanding the processes and individualization of developmental paths, and focusing on the well-being and involvement of members at all levels of the organization. Moreover, some suggestions, listed below, have been implemented to design interventions aimed at observing and improving mental health. They are:

- providing consistent and clear information on safety procedures and rules,
- organising specialist assistance to ensure the recovery of resources (preferably anonymous and external),
- providing institutional support to those that are most at risk of losing resources (women, parents, lonely people, people at risk of falling ill, people without social support or overburdened with work or a family situation) by introducing flexible working hours for some time after the immediate threat ceases.

It is also worth paying attention to the importance of constantly building each organization's ability to develop and multiply its capital (cooperation, trust, sharing leadership) when building an ethos, which, in a crisis, determines the strength of the organization's resilience to difficult events. The need to change the approach may not seem anything new because it results from a change in the management paradigm, however, the time of the Covid-19 pandemic has been such a painful experience for humanity that no one can ignore it. Humanity is more mature and aware not only of the need to react faster to changes, but also in terms of organisation policy of taking care of its members' well-being and involvement.

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163 M. Franicka, *Education in XXI – how to overcome problems with dispersion?*, [in:] *Education – Multiplicity of Meanings, Commonality of Goals*, (eds.) B. Pitula, I. Nowosad, Vandenhoeck & Ruprecht Verlag, Göttingen 2022, pp. 123–136.



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## Chapter 4.

# Educational policy towards ethnic minorities in the educational system in Poland after 1989 on the example of the Lemkos

### Introduction

The democratization of the Polish state system was a breakthrough for national and ethnic minorities. For the first time in post-war Poland, representatives of minorities could feel that they were equal citizens. This also applied to the issue of education policy. Among them were also Lemkos. The aim of this paper is to analyse the educational policy towards ethnic minorities in the educational system in Poland after 1989 on the example of the Lemko minority. In order to give a more complete picture of the situation, it was necessary to present it in relation to earlier times. In order to analyse the presented issue, 3 research methods were applied: institutional-legal, normative-behavioural and historical.

Lemkos are one of the four legally recognised ethnic minorities in Poland<sup>164</sup>. They are an East Slavic ethnic group identifying themselves as part of the Ruthenian (Carpathian) nation or as part of the Ukrainian nation. Jarosław Moklak, on the other hand, distinguished three orientations: Old Ruthenian, Moscovophile and Ukrainianophile<sup>165</sup>. All of them had their adherents among the Lemko population. Lemkos are of Orthodox and Greek Catholic faiths<sup>166</sup>.

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164 Journal of Laws 2017, item 823.

165 J. Moklak, *Tożsamość Łemków – uwarunkowania historyczne (XIX–XX w.)*, [in:] *Odkrywcy i budziciele Łemkowszczyzny. Materiały konferencyjne*, (eds.) A. Strzelecka, L. Puchała, Oficyna Wydawnicza Miejskiej Biblioteki Publicznej im. Grzegorza z Sanoka w Sanoku, Sanok 2007, p. 5; see also: Z. Mach, *Symbols, Conflict, and Identity. Essays in Political Anthropology*, State University of New York Press, Albany 1993, p. 234. A. A. Zięba, B. Horbal, among others, enter into a polemic with J. Moklak on the terminology. Horbal, who argue that the term ‘Moscovophilism’ has pejorative overtones, see more extensively: A. A. Zięba, *Łemkowie i Łemkowszczyzna w historiografii polskiej*, [in:] *Łemkowie i łemkoznawstwo w Polsce*, (ed.) idem, Kraków 1997; B. Horbal, *Rusofilstwo czy moskalofilstwo lub moskwofilstwo. Przyczynek do dyskusji nad nieścisłościami terminologicznymi*. “Prace Komisji Wschodnioeuropejskiej”, 9, (eds.) H. Duć-Fajfer, A. Podraza, A. A. Zięba, Kraków 2004.

166 J. A. McGuckin, *The Orthodox Church – An Introduction to its History, Doctrine, and Spiritual Culture*, Wiley-Blackwell, Malden-Oxford 2008, p. 20; R. Reinfuss, *Śladami*

Another contentious issue concerns the origin of Lemkos. They are an ethnographic group that formed in a long historical process, absorbing and assimilating various ethnic elements. This has given rise to several theories regarding their ethnogenesis. These questions are as yet unresolved, and none of the hypotheses is convincingly documented. One of these is the so-called Wallachian migration theory<sup>167</sup>. Another hypothesis claims that the Lemkos are the ancestors of the White Croats. They were supposed to inhabit inaccessible mountain areas, thus defending themselves against the Tatars and Polish colonists after the fall of the Kievan Principality<sup>168</sup>. The next is the so-called Thracian theory, according to which pastoral tribes were supposed to have inhabited the Carpathians as far back as ancient Roman times<sup>169</sup>.

Lemkos are a “Lemko-speaking” people. It is difficult to define what this “speech” is. A different opinion on the subject emerges depending on the identification of the Lemko group in question. The pro-Ruthenian community considers its speech to be a literary language, while the pro-Ukrainian community speaks of a folk language, dialect, or variation. Lemkos usually colloquially state that it is their “native speech” and cannot address the question of the status of the ethnolect: language or dialect<sup>170</sup>. The native land of the Lemkos is Lemkivshchyna (Lemkovyna), which they inhabited until the outbreak of World War II. This region is located in the Carpathian Mountains, on the Polish-Slovakian border<sup>171</sup>.

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*Lemków*, PTTK “Kraj”, Warszawa 1990, p. 77; see also: M. B. Cunningham, E. Theokritoff (eds.), *Orthodox Christian Theology*, Cambridge University Press, Cambridge 2009.

- 167 Z. Szanter, *Skąd przybyli przodkowie Lemków? O osadnictwie z południowych stoków Karpat w Beskidzie Niskim i Sądeckim*. “Magury ’93”, (eds.) P. Luboński, T. A. Olszański, A. Wieloch, Warszawa 1994, p. 8; R. Reinfuss, op. cit., p. 10; A. Bata, *Lemkowie*, Apla, Krosno 2004, p. 3.
- 168 See: I. Grat, *Історія північної Лемківщини до вигнання Лемків*, [in:] *Лемківщина Земля – люди – історія – культура*, vol. I, (ed.) B. A. Strumiński, The Shevchenko Scientific Society, New York-Paris-Sydney-Toronto 1988, pp. 155–157; I. F. Lemkyn (J. Polański), *Історія Лемковини*, Yonkers, N.Y. 1969, p. 40; I. Krasowski, *Problem autochtonizmu Rusinów w Beskidzie Niskim*, [in:] *Lemkowie w historii i kulturze Karpat*, part 1, (ed.) J. Czajkowski, Muzeum Budownictwa Ludowego w Sanoku, Sanok 1995, pp. 381–387; R. Reinfuss, *Lemkowie jako grupa etnograficzna*, Muzeum Budownictwa Ludowego w Sanoku, Sanok 1998, p. 31; A. Bata, op. cit., p. 3.
- 169 See more: T. Sulimirski, *Trakowie w Północnych Karpatach i problem pochodzenia Wołochów*. “Magury 85”, (ed.) A. Zatorska, Warszawa 1985, pp. 3–27.
- 170 M. Misiak, *Lemkowie. W kręgu badań nad mniejszościami etnolingwistycznymi w Europie*, Wrocław 2006, p. 125; compare: Z. Stieber, *Dialekt Lemków*, Ossolineum, Wrocław-Warszawa 1982; B. Strumiński, *Kiedy powstał i skąd się wziął dialekt lemkowski*. “Magury ’93”, (eds.) P. Luboński, T. A. Olszański, A. Wieloch, Warszawa 1994, pp. 21–26.
- 171 Describing Lemkivshchyna more broadly exceeds the scope of the work, and interpretations of its boundaries vary, compare: S. Leszczycki, *Zarys antropogeograficzny Lemkowszczyzny*. “Wierchy. Rocznik poświęcony górcom i góralszczyźnie”, (eds.) W. Goetle, J. A. Szczepański, Kraków 1935, p. 63; R. Reinfuss, *Lemkowie (opis etnograficzny)*. “Wierchy. Rocznik poś-

The author uses the terms “national minority” and “ethnic minority” in accordance with the definitions in Article 2(1) of the 2005 Act:

“A national minority (...) shall be a group of Polish citizens who jointly fulfill the following conditions: 1) is numerically smaller than the rest of the population of the Republic of Poland; 2) significantly differs from the remaining citizens in its language, culture or tradition; 3) strives to preserve its language, culture or tradition; 4) is aware of its own historical, national community, and is oriented towards its expression and protection; 5) its ancestors have been living on the present territory of the Republic of Poland for at least 100 years; 6) identifies itself with a nation organized in its own state”<sup>172</sup>.

In the case of the definition of an ethnic minority, the first five criteria are common to those defining national minorities. The difference, however, is contained in point 6, as an ethnic minority does not identify with a nation organized in its own state. A total of 13 minorities correspond to the statutory criteria, including 9 national minorities (Belarusian, Czech, Lithuanian, German, Armenian, Russian, Slavic, Ukrainian, Jewish) and 4 ethnic minorities. In addition to Lemkos, these include Karaites, Roma and Tatars<sup>173</sup>.

## Legal conditions for the development of minority education until 1989

After 1945, Poland, in its new territorial shape, became an almost mono-national state. According to estimates at the time, national minorities accounted for no more than 2 percent of the population<sup>174</sup>. The change in the national composition and size of minorities was influenced by the change of borders, the Nazi extermination of entire population groups (mainly Jews and Roma), wartime population movements and post-war migration flows<sup>175</sup>.

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więcony górom i góralszczyźnie”, Kraków 1936; B. Halczak, *Łemkowskie miejsce we wszechświecie. Refleksje o położeniu Łemków na przełomie XX i XXI wieku*, [in:] *Łemkowie, Bojkowie, Rusini – historia, współczesność, kultura materialna i duchowa*, (eds.) S. Dudra, B. Halczak, R. Drozd, I. Betko, M. Smigel', vol. IV, part 1, Łemkowski Zespół Pieśni i Tańca “Kyczera”, Słupsk-Zielona Góra 2012, p. 120.

172 Journal of Laws. 2005 No. 17, item 141.

173 Ibidem.

174 A. Kwilecki, *Mniejszości narodowe w Polsce Ludowej*. “Kultura i Społeczeństwo”, 4, 1963, pp. 87–88.

175 S. Łodziński, *Polityka wobec mniejszości narodowych i etnicznych w Polsce w latach 1945–2008*, [in:] *Mniejszości narodowe i etniczne w Polsce po II wojnie światowej. Wybrane elementy polityki państwa*, (eds.) S. Dudra, B. Nitschke, Nomos, Kraków 2010, p. 17; K. Kersten, *Przemiany struktury narodowościowej Polski po II wojnie światowej. Geneza i wyniki*. “Kwartalnik Historyczny”, 2, 1969.

The realization of the concept of a unitary state dominated the policies of the main political camps (both London and Communist)<sup>176</sup>. The authorities of the Polish state believed that the national minorities remaining within its new borders should be marginalized and subjected to a process of assimilation. After the experience of the war, this plan had enormous public support<sup>177</sup>.

The short period of democratization of public life between 1955 and 1958 resulted in the official recognition by the authorities of the existence of national minorities in the country and the creation of institutional solutions to safeguard the identity of these communities. On the basis of registered and functioning minority associations, we can say that the authorities recognised the following groups: Belarusians, Czechs and Slovaks, Lithuanians, Roma, Russians, Ukrainians and Jews<sup>178</sup>. Officially recognised minority organizations were more instruments of the authorities' supervision over them than their partners in shaping nationality policy. Any departure from their designated framework was regarded as a manifestation of national "separatism"<sup>179</sup>. In terms of linguistic rights, the right to teach the minority's mother tongue in the school system, the establishment of a weekly newspaper constituting the official press organ of the monopolistic organization representing (and controlling) the minority in question, the publication of books with literary texts and yearbooks-calendars in the minority language were important<sup>180</sup>.

In the late 1950s, however, these institutions began to be used to indoctrinate the non-Polish population, and in the late 1960s to assimilate them<sup>181</sup>. This culminated in the events of March 1968. It was then that the thesis of the nationally unified character of the Polish state began to be pushed, which was

176 S. Łodziński, op. cit.; K. Przybysz, *Polityka wobec mniejszości narodowych*. "Sprawy Polityczne", 1/2, 2001, pp. 79–86; J. Wrona, *Mniejszości narodowe w polityce PZPR (1949–1989)*, [in:] *Między rzeczywistością polityczną a światem iluzji. Rozwiązanie problemu mniejszości narodowych w polskiej myśli politycznej XX wieku*, (eds.) J. Jachymek, W. Paruch, Wydawnictwo Uniwersytetu Marii Curie-Skłodowskiej, Lublin 2001, pp. 247–258.

177 S. Łodziński, op. cit.; K. Kersten, *Polska – państwo narodowe. Dylematy i rzeczywistość*, [in:] *Narody. Jak powstawały i jak wybiły się na niepodległość?*, (ed.) M. Kula, PWN, Warszawa 1989, p. 462.

178 Immigrant groups such as Greeks and Macedonians were accepted, and temporarily, in the late 1980s, also Vietnamese. Vietnamese were also temporarily accepted in the late 1980s. Lemkos, as a separate group, did not receive permission from the authorities and were included in the Ukrainian group. The Tatars, Armenians and Karaites, for whom religion played a major identity role, were treated more as exotic religious communities than as national or ethnic groups, L. Olejnik, *Polityka narodowościowa Polski w latach 1944–1960*, Wydawnictwo Uniwersytetu Łódzkiego, Łódź 2003, pp. 586–590.

179 S. Łodziński, op. cit., p. 22.

180 H. Duć-Fajfer, *Historia i sytuacja języka łemkowskiego w ostatnim stuleciu*. "Poradnik Językowy", 7, 2021, p. 54.

181 E. Mironowicz, *Polityka narodowościowa PRL*, Białoruskie Towarzystwo Historyczne, Białystok 2000, p. 261.

sanctioned by the resolution of the Third Plenum of the Central Committee of the Polish United Workers' Party (PZPR) of 1976 on the "moral and political unity of the Polish nation". This policy was accompanied by discriminatory actions. From the late 1970s, national minorities in Poland became virtually invisible in public<sup>182</sup>.

The marginalization of minorities gave rise to the phenomenon of hidden ethnic pluralism, which functioned in people's consciousness without the support of public institutions. Representatives of minorities in Poland were able to maintain a sense of their otherness, but in a way that was invisible to those around them. There was an "intimidation syndrome", i.e. a fear of publicly declaring their nationality. Maintenance of ethnic identity was mainly through family and religion. The assimilation policy towards minorities was fostered by the social and economic changes taking place in Poland at the time, especially industrialization, migration from the countryside to the cities and the expansion of mass culture in the Polish language (radio and television), as well as the Polonising role of the Roman Catholic Church. The problems of state policy towards minorities and the extent of their guaranteed rights were not discussed in society. Information about them ceased to appear in statistical yearbooks (this included the cessation of publication of data on existing education in the minorities' native languages) and in scientific literature<sup>183</sup>.

It was not until the 1980s and the activities of the Solidarity Trade Union (NSZZ Solidarność) that there was a significant change in the treatment of national minorities. Already at the First National Delegates' Convention in 1981, the Solidarity authorities decided to change the treatment of national minorities. They passed a resolution on national minorities at the 1st National Delegates' Congress in 1981, which first and foremost emphasized the right of minorities to "unhindered national existence and to cultivate their own identity"<sup>184</sup>. During the work of the Civic Committee under the Solidarity Chairman Lech Wałęsa, the Commission for Cooperation with National Minorities was established in Jan-

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182 S. Łodziński, op. cit., p. 20.

183 Ibidem, p. 23.

184 A. Malicka, *Status prawny mniejszości narodowych i etnicznych w Polsce – ustawa o mniejszościach narodowych i etnicznych oraz języku regionalnym*, [in:] *Aktualne problemy ochrony wolności i praw mniejszości w Polsce i na świecie*, (eds.) J. B. Banach-Gutierrez, M. Jabłoński, E-Wydawnictwo. Prawnicza i Ekonomiczna Biblioteka Cyfrowa. Wydział Prawa, Administracji i Ekonomii Uniwersytetu Wrocławskiego, Wrocław 2017, p. 58. Full text of the resolution adopted on October 7, 1981 in Gdansk, see: S. Łodziński, *Struktura narodowościowa Polski i polityka wobec mniejszości w latach 1989–1992*, Biuro Studiów i Ekspertyz, Kancelaria Sejmu, Warszawa 1992, p. 9.

uary 1989<sup>185</sup>. It was headed by Marek Edelman, with Jacek Kuroń as vice-chairman and Grzegorz Kostrzewa-Zorbas as secretary<sup>186</sup>. The Commission was to be an auxiliary body of the Civic Committee, preparing expert opinions and draft regulations on minorities for it. In addition, dissemination in minority circles of the activities and programmes of independent civic movements in Poland was seen as a complementary activity. The need to transform the situation of minorities in Poland in the spirit of respect for human and civil rights and papal teaching was treated as an inspiration for action<sup>187</sup>. The Commission for Cooperation with National Minorities pointed to the need to ensure that minorities were free to create organizations of national life that reflected social and political pluralism<sup>188</sup>.

In April 1989, a liberal act on associations was adopted, also affecting the possibility of minority communities to organize. The increased importance of national issues led to a meeting of representatives of nationality associations at the Central Committee of the PZPR in May 1989, at which a decision was taken to reactivate the Commission of the Central Committee of the PZPR for Nationalities. Due to political changes, however, it did not live to see implementation. The policy of the PRL authorities towards minorities was a consequence of the post-war changes in the ethnic structure of Poland and its homogenization. The attitude towards them was characterized, on the one hand, by their limited right to maintain their identity (mainly through folklore) and, on the other hand, by their exclusion from the public sphere as minorities (i.e. because of their ethnicity and the emphasis on assimilation as a means of social integration)<sup>189</sup>.

Already after the elections, in August 1989, a parliamentary Commission on National and Ethnic Minorities was established. Subsequently, minority affairs were transferred from the Ministry of Internal Affairs and Administration to the Ministry of Culture and the Arts. Thus began the policy of protecting the rights of minorities<sup>190</sup>. However, the symbol of the changes at that time became the

185 J. Mieczkowski, *Między teorią a praktyką polityki wobec mniejszości narodowych w Polsce*. "Acta Politica Polonica", 21, p. 29; see more: R. Drozd: *Polityka władz wobec ludności ukraińskiej w Polsce w latach 1944–1989*, Tyrsa, Warszawa 2001, pp. 328–329.

186 The committee also included: Bogumiła Berdychowska, Zbigniew Bujak, Rev. Michał Czajkowski, Andrzej Fredman, Sokrat Janowicz, Adolf Józwenko, Jan J. Lipski, Włodzimierz Mokry, Bogdan Skaradziński, Tomasz Szczepański, Krzysztof Śliwiński, Kazimierz Trzęsicki, Rimas Vajna, Eugeniusz Wappa, Kazimierz Wóycicki, J. Mieczkowski, op. cit.

187 Reference was made to John Paul II's message of 1 January 1989, J. Mieczkowski, op. cit.

188 M. Czech (ed.), *Ukraińcy w Polsce 1989–1993. Kalendarium. Dokumenty. Informacje*, Związek Ukraińców w Polsce, Warszawa 1993, pp. 75–76.

189 S. Łodziński, *Polityka wobec mniejszości...*, p. 21.

190 H. Duć-Fajfer, op. cit., p. 55; S. Łodziński, *Przekroczyć własny cień. Prawne, instytucjonalne oraz społeczne aspekty polityki państwa polskiego wobec mniejszości narodowych w latach 1989–1997*, [in:] *Mniejszości narodowe w Polsce. Praktyka po 1989 roku*, (ed.) B. Berdychowska, Wydawnictwo Sejmowe, Warszawa 1998.

statement of Prime Minister Tadeusz Mazowiecki on 12 September 1989 in the Sejm: “Poland is a state and a homeland not only for Poles, but also for national minorities”<sup>191</sup>. This statement meant in practice that members of minority communities were equal citizens of Poland. Its consequence was that national and ethnic minorities were treated subjectively, not objectively<sup>192</sup>.

## Legal conditions for the development of minority education after 1989

After 1989 there was a reorientation of the nationality policy of the state and the introduction of legal regulations relating to national and ethnic minorities. The shape of the Polish state policy towards national minorities at that time was determined by several factors. One of them was the issue of building a civil society. It was noted that representatives of independent political thought before 1989 included dialogue with minorities as a factor in the realization of a state based on the rule of law and justice. These were evident both in the slogans of the “first” Solidarity and in the political thought of the opposition in the 1980s<sup>193</sup>.

The right to education for minorities in their mother tongue was soon constitutionally and statutorily guaranteed<sup>194</sup>. It also found reinforcement in Poland’s international obligations, both under bilateral treaties with neighboring

191 “Diariusz Sejmowy” 1989, 17, p. 4.

192 J. Mieczkowski, op. cit., p. 34; B. Berdychowska, *Polska polityka narodowościowa w latach 1989–1994*. “Kultura” 1995, 5, p. 88.

193 J. Mieczkowski, op. cit., p. 29; C. Żołądowski, *Kwestia mniejszości narodowych w Polsce*, [in:] *Kwestie społeczne i krytyczne sytuacje życiowe u progu lat dziewięćdziesiątych (wybrane zagadnienia)*, (eds.) J. Danecki, B. Rysz-Kowalczyk, UW. IPS Ośrodek Badań Społecznych, Warszawa 1994, p. 346.

194 The 1961 Act on the Development of the System of Education and Upbringing, which was in force for 30 years, did not contain relevant provisions guaranteeing national minorities the right to education in their mother tongue. Indirectly, such rights flowed from the provision of Article 67 of the 1952 Constitution ensuring equal rights to citizens of the People’s Republic of Poland regardless of nationality. Until the Act on the Education System of 1991 came into force, the matters of organizing the teaching of national minority languages were regulated only at the level of regulations of the Minister of National Education. Between 1989 and 1992, the Ordinance of 21 December 1988 on the organization of mother-tongue teaching in primary schools and general secondary schools for children and young people of non-Polish nationality (Official Journal of the Ministry of Education No. 11, item 69) was in force. The Ordinance was issued on the basis of the general delegation contained in Article 36a of the 1961 Act on the Development of the Education System and Upbringing to regulate by means of regulations the principles of creating a school network, E. Pogorzała, *Ewolucja polityki oświatowej państwa polskiego wobec mniejszości narodowych i etnicznych po 1989 r.* “Facta Simonidis”, 1, p. 93.

countries and in adopted documents of international organizations dedicated to the protection of the rights of national minorities<sup>195</sup>.

Article 13 of the act of 7 September 1991 on the educational system stipulated that “Public schools and institutions enable students to maintain their sense of national, ethnic, linguistic and religious identity, and in particular to learn their language and their own history and culture”<sup>196</sup>. In March 1992, the Ministry of National Education issued a regulation on the organization of education enabling students belonging to national minorities to maintain their sense of national, ethnic and linguistic identity<sup>197</sup>. Since 1 January 2003, the Regulation of the Minister of National Education and Sport of 3 December 2002 on the conditions and manner of performing by public schools and institutions the tasks enabling students belonging to national minorities and ethnic groups to sustain their sense of national, ethnic, linguistic and religious identity was in force<sup>198</sup>. The requirements related to the process of integration into the European Union, including the so-called Copenhagen criteria, have also had a significant impact on the evolution of policy towards minorities<sup>199</sup>.

In 2005, the act regulating the status of minorities in Poland saw the light of day<sup>200</sup>. The final version of the act was drafted by a subcommittee appointed for this purpose and submitted to the Sejm, which passed the act on 4 November 2004. Following amendments by the Senate, the Sejm adopted the Act on National and Ethnic Minorities and Regional Language on 6 January 2005. The act

195 See more: E. Pogorzała, *Szkolnictwo dla mniejszości narodowych i etnicznych w Polsce w okresie transformacji*, [in:] *Mniejszości narodowe i etniczne w procesach transformacji oraz integracji*, (eds.) E. Michalik, H. Chałupczak, Uniwersytet Marii Curie-Skłodowskiej, Lublin 2006, pp. 327–338.

196 I. e. Journal of Laws 2004, No. 256, item 2572 as amended.

197 Regulation of the Minister of National Education of 24 March 1992 on the organization of education enabling students belonging to national minorities to maintain their sense of national, ethnic and linguistic identity, Journal of Laws 1992 No. 34, item 150.

198 Journal of Laws 2022 No. 220, item 1853. The most recent ordinances on the conditions and manner of performance by public kindergartens, schools and institutions of tasks enabling the maintenance of the sense of national, ethnic and linguistic identity of students belonging to national and ethnic minorities and communities speaking a regional language are dated 18 August 2017 (available at: <https://isap.sejm.gov.pl/isap.nsf/download.xsp/WDU20170001627/O/D20171627.pdf>) (access: 24.06.2023) and 4 February 2022 (available at: <https://isap.sejm.gov.pl/isap.nsf/download.xsp/WDU20220000276/O/D20220276.pdf>) (access: 24.06.2023).

199 See: R. Prostack, *Nowe państwa członkowskie i “polityczne kryteria kopenhaskie”*. “Politeja. Pismo Wydziału Studiów Międzynarodowych i Politycznych Uniwersytetu Jagiellońskiego”, 39, 2015.

200 For more on this topic, see: S. Łodziński, *Spory wokół ustawy o ochronie mniejszości narodowych i etnicznych w Polsce okresu transformacji*, [in:] *Mniejszości narodowe i etniczne w procesach integracji i transformacji*, (eds.) E. Michalik, H. Chałupczak, Lublin 2006, pp. 287–312.

entered into force on 2 May that year<sup>201</sup>. It was the longest act in the history of the Polish parliamentary procedure. Work on its draft began in the early 1990s<sup>202</sup>. Helena Duć-Fajfer claims that the protracted work was the result of the long-term policy of the People's Republic of Poland, which took into account neither the existence nor the need for cultural diversity in the assumed project of a homogenous socialist state. The fact that the act took such a long time to proceed was primarily related to the question of how to define minorities themselves, what definition to adopt and to whom this status was to be granted<sup>203</sup>.

As Sławomir Łodziński points out, state policy towards minorities was defined in the early 1990s and has remained unchanged until now. Its main task is to create opportunities for national and ethnic minorities to maintain their cultural identity, by creating a framework for tolerance, but above all by being able to finance specific activities. Further tasks concerned the prevention of ethnic discrimination: "(...) the integration of minorities into the majority society, which was to be based on the cooperation of national minority associations with the public administration on the basis of the principle 'nothing about us without us'"<sup>204</sup>.

The act on national and ethnic minorities makes a distinction between a national and an ethnic minority, the essential difference being based on identifying or not with a nation organized in its own state<sup>205</sup>. The act in question underlines in its first article that:

"(...) shall regulate the issues connected with the maintenance and development of the respective cultural identity of national and ethnic minorities, the preservation and development of the regional language, and the observance of the principle of equal treatment of individuals irrespective of their ethnic descent; it also defines the tasks and powers of government administration agencies and of local government units in this regard"<sup>206</sup>.

201 A. Malicka, op. cit., p. 60.

202 H. Duć-Fajfer, *Paternalizm unikowy, czyli jak radzić sobie z ustawowymi zobowiązaniami*, [in:] *Między łękiem a nadzieją. Dziesięć lat funkcjonowania ustawy o mniejszościach narodowych i etnicznych oraz o języku regionalnym (2005–2015)*, (eds.) A. Adamczyk, A. Sakson, C. Trościak, Poznań 2015, p. 72.

203 H. Duć-Fajfer, op. cit., p. 75.

204 S. Łodziński, *Przed ustawą o mniejszościach. Charakter instytucjonalizacji praw osób należących do mniejszości narodowych po 1989 roku a ustawa o mniejszościach z 2005 roku*, [in:] *Między łękiem a nadzieją...*, p. 31.

205 The community to which the Act applies is also Kashubian – but not subject to it as a collective. The act subjects the regional language, Kashubian, to the legal status of a language, M. Mazurek, *Polityka wobec mniejszości w Polsce*. "Miscellanea Anthropologica et Sociologica", 1 (21), 2020, p. 51.

206 Act of 6 January 2005 on national and ethnic minorities and regional language, Journal of Laws. 2005 No. 17, item 141.

The legislator reorganized the scope of activities of the public authorities hitherto dealing with minority matters and established a new body with specific competences in regulating the affairs of national and ethnic minorities. The fifth chapter of the act in question identifies three authorities responsible for minority matters – two of them are governmental administrative bodies, namely: the minister responsible for religious denominations and national minorities (art. 21) and the provincial governor (art. 22). The Ministry of Interior and Administration is the competent ministry. The newly established body was the Joint Commission of the Government and National and Ethnic Minorities (arts. 23–30) acting as an opinion and advisory body of the Prime Minister<sup>207</sup>.

Since 2005, minor amendments have been made to the act. The first one was introduced in May 2014<sup>208</sup>. It concerned enhancing the integration of persons belonging to national and ethnic minorities and essentially referred to the Roma minority. This amendment enabled the continuation of the government programme for the Roma community from 2014 to 2020 preventing the social exclusion of Roma<sup>209</sup>. On 18 July 2014, meanwhile, a draft act amending the Act on National and Ethnic Minorities and Regional Language, as well as some other acts was submitted to the Sejm<sup>210</sup>. Its aim was to grant ethnic minority status to Silesians. Legislative work was continued by the eighth-term Sejm, but the committee considering the draft act eventually requested its rejection<sup>211</sup>.

In 2015, an amendment to the act on national and ethnic minorities and regional language was passed by the Sejm<sup>212</sup>. The proposed amendments included Article 9 and the introduction of the possibility to use an auxiliary language also before the county authorities on its basis. The act was vetoed by Andrzej Duda, President of the Republic of Poland<sup>213</sup>.

The rights provided for in the act in question are enjoyed to the same extent by both national and ethnic minorities. The legislator's enumerative listing of national and ethnic minorities meeting the criteria contained in the statutory regulation clearly defines the addressees of the rights guaranteed therein. It

207 A. Malicka, op. cit., pp. 68–69.

208 Act of 30 May 2014, Journal of Laws 2014, item 829.

209 A. Malicka, op. cit., p. 60.

210 Parliamentary paper No. 27. Available at: <http://orka.sejm.gov.pl/Druki8ka.nsf/0/C0A4A89D9FB212F8C1257F0200335BB1/%24File/27.pdf> (access: 24.06.2023); A. Malicka, op. cit., p. 60.

211 Ibidem.

212 Poselski projekt ustawy o zmianie ustawy o mniejszościach narodowych i etnicznych oraz o języku regionalnym oraz niektórych innych ustaw. Available at: <http://www.sejm.gov.pl/sejm7.nsf/PrzebiegProc.xsp?nr=3545> (access: 24.06.2023).

213 *Prezydent zawetował trzy ustawy*. Available at: <http://www.prezydent.pl/prawo/ustawy/zawetowane/art,2,prezydent-zawetowal-trzy-ustawy.html> (access: 24.06.2023); A. Malicka, op. cit., p. 61.

should be noted that representatives of many other nationalities also reside in the territory of Poland. Their numbers are often significant and, like the recognised national or ethnic minorities, they live in large concentrations<sup>214</sup>.

The relevant provisions regulating the exercise of the right to education in a minority language and in a minority language are contained in Chapter 3 of the act in Articles 17 and 18. Such a general formulation of this entitlement for national and ethnic minorities and for minorities speaking a regional language was mainly due to the fact that the issues related to education in a minority language and in a minority language had already been established several years before the entry into force of the act in question in the Education System Act<sup>215</sup>, and detailed provisions on the organization of minority education are regulated by the relevant ordinances to the Education System Act<sup>216</sup>. In Article 17 of the act concerning the realization of the right to education in the minority language and in the minority language and the right to education in minority history and culture, the legislator refers directly to the provisions contained in the Education System Act<sup>217</sup>.

Article 18 of the Act on national and ethnic minorities and regional language sets out the obligation of public authorities to support activities aimed at protecting, preserving and developing the cultural identity of minorities. The fulfillment of this obligation is based, in particular, on financial support for minorities in the form of grants from the state budget funds intended to finance the activities of cultural institutions, publishing books and magazines, supporting radio and television programmes, running libraries and promoting knowledge about minorities. These funds are granted at the request of interested entities within the framework of competitions announced annually by the Ministry responsible for national and ethnic minorities<sup>218</sup>.

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214 However, these are often groups of foreigners residing in Poland on the basis of appropriate permanent residence permits or groups of Polish citizens of non-Polish national origin who do not, however, meet the condition of at least 100 years of residence on Polish territory. Examples include numerous groups of Vietnamese and Greeks. The Vietnamese came to Poland until the 1960s to study, many of whom have remained in Poland. Today, they make up a community of more than 40 000 people, *ibidem*, p. 63.

215 Journal of Laws of 2004 No. 256, item 2572 as amended; A. Malicka, *op. cit.*, p. 67.

216 Regulation of the Minister of National Education and Sport of 3 December 2002 on the conditions and manner of performing by public schools and institutions the tasks enabling the maintenance of the sense of national, ethnic, linguistic and religious identity of students belonging to national minorities and ethnic groups, Journal of Laws. No. 220, item. 1853.

217 A. Malicka, *op. cit.*, p. 68.

218 Journal of Laws 2005 No. 17, item 141.

## Lemkos in the educational system in Poland before 1989

After the Second World War there were difficult times for Lemkos. They survived the camp in Jaworzno<sup>219</sup>, they were displaced from Lemkivshchyna first to the Soviet Union (already from 1944) and then to the western and northern lands of Poland under the Operation “Vistula”. There was also a vivid memory of the injustices they had suffered back in the First World War in Talerhof<sup>220</sup>. It should be emphasized that all nationalities within the Soviet Union’s sphere of influence experienced a lack of civil liberties and surveillance by the authorities into every sphere of life. Secrecy of correspondence was violated, interrogations were summoned, searches were carried out and the Church was persecuted<sup>221</sup>.

The seven recognised national minorities, including the Ukrainians, were given a certain amount of cultural rights. From 1956, there was the Ukrainian Social and Cultural Society (UTSK). The Lemkos, who began to integrate informally quite quickly after their displacement and dispersal in the Western Territories, were even given a semblance of minimal autonomy within the UTSK in the form of a Lemko Section and, within the Ukrainian-language weekly “Наше Слово”, a single page “Лемківська Сторінка” edited in the Lemko “dialect”. However, in the long run, the UTSK was supported only by the Ukrainophile Lemkos. The established organization’s task was to popularise Ukrainian culture, organize schools with the mother tongue, concerts of folk ensembles, develop a network of libraries and reading rooms and take care of regional Ukrainian culture<sup>222</sup>. In spite of the unfavorable socio-political situation in Poland, Lemkos undertook further activities to emphasize the national distinctiveness of this community<sup>223</sup>.

219 See: Ł. Kamiński, *Ukraińcy w COP Jaworzno w oczach prokuratury wojskowej*. “Wrocławskie Studia z Historii Najnowszej”, 8, 2001; K. Miroszewski, *Centralny Obóz Pracy Jaworzno. Podobóz ukraiński (1947–1949)*, Śląsk, Katowice 2001; idem, *Ukraińcy i Lemkowie w Centralnym Obozie Pracy Jaworzno*, [in:] *Pamiętny rok 1947*, (ed.) M. E. Ożóg, Rzeszów 2001; idem, *Powstanie i funkcjonowanie Centralnego Obozu Pracy w Jaworznie (1945–1949)*. “Dzieje Najnowsze”, 2, 2002; Ł. Kamiński, *Obóz Jaworzno. Ukraiński etap*, [in:] *Akcja “Wisła”*, (ed.) J. Pisuliński, Warszawa 2003; *Obóz dwóch totalitaryzmów. Jaworzno 1943–1956*, vol. 2, (ed.) R. Terlecki, Jaworzno-Katowice 2007; I. Hałagida (ed.), *Duchowni greckokatoliccy i prawosławni w Centralnym Obozie Pracy w Jaworznie (1947–1949). Dokumenty i materiały*, Instytut Pamięci Narodowej Warszawa 2012.

220 See: *Галицька Голгота*, (eds.) P. S. Hardy, H. Lane, Trumbull, Conn. 1964.

221 A. Tyda, *The consequences of the 1989 changes in the socio-political activity of Lemkos in Poland and the United States*. “Przegląd Narodowościowy – Review of Nationalities”, 11, 2021, p. 84.

222 A. Tyda, *Społeczno-polityczne aspekty emigracji Lemków do Stanów Zjednoczonych w latach 1945–1989*, [in:] *Ekonomiczne, kulturowe i społeczne aspekty migracji*, (eds.) J. Jędrzejewska, P. Szymczyk, Tygiel, Lublin 2022, p. 146.

223 S. Dudra, *Lemkowskie “stawanie się” narodem*. “Przegląd Narodowościowy – Review of Nationalities”, 2, 2013, p. 100.

In the field of native language teaching, despite repeated efforts, Lemko activists did not succeed in obtaining any form of admission of the Lemko language to school teaching. The proposed lessons of the Ukrainian language for a significant part of Lemkos had no native value, hence they did not take advantage of this opportunity<sup>224</sup>. In this situation, the Lemko language was deprived of institutional facilities and the possibility to function in the public space, while it functioned in the family space, very often, however, in a hidden way behind closed doors, which lowered its status and in many situations led to the inhibition of intergenerational transmission. Patriotic self-education in some families was based on pre-war and émigré publications, which reinforced self-esteem regardless of the situation. Some parents, on the other hand, regarded language as unnecessary ballast and a marker of inferiority, which they did not want to burden their children with. On the other hand, for part of the Lemko community, language was the most durable, easily recognizable and indispensable identity marker<sup>225</sup>.

In 1969, the Lemkos formed the Song and Dance Ensemble “Lemkowyna” in Bielanka near Gorlice. It was made up of Lemkos living both in the Lemkivshchyna and in the Western Lands of Poland. Since 1979, on the other hand, annual gatherings “by the fire” were organized in Michałów near Legnica<sup>226</sup>. The activity of Lemkos and the carnival of Solidarity contributed to an attempt to establish a Lemko Culture Lovers Society in 1982. Ultimately, as a result of the lack of support from the state authorities and the reluctance of Ukrainian circles, this attempt failed<sup>227</sup>.

There were Ukrainian language teaching points and schools with a Ukrainian language of instruction, notably the IV High School in Legnica. Only Ukrainophile Lemkos benefited from this education. The problems of national minority communities were not publicly exposed. There was no discussion of their rights and position in Poland, nor of their relations with the majority. They were usually revealed during political crises<sup>228</sup>. It was in churches – both Orthodox and Greek Catholic<sup>229</sup> – that the memory of tradition and culture was kept alive, and the Lemko language was cultivated. In addition, the recultivation of many individuals was influenced by the above-mentioned “Lemko Vatra”, bringing

224 K. Pudło, *Lemkowie. Proces wrastania w środowisko Dolnego Śląska*, Polskie Towarzystwo Ludoznawcze, Wrocław 1987, pp. 81–132.

225 H. Duć-Fajfer, *Historia i sytuacja języka lemковского...*, pp. 54–55.

226 Later changed its name to “Lemko Vatra”.

227 S. Dudra, op. cit., pp. 104–106; A. Tyda, *The consequences of the 1989 changes...*, p. 84.

228 S. Łodziński, *Polityka wobec mniejszości...*, p. 23.

229 It should be noted that the Greek Catholic Church had been unrecognized by the authorities since 1946 and tolerated only since 1956.

together Lemkos of different generations, as well as other ethnic events, such as concerts and dance parties<sup>230</sup>. As Eugeniusz Mironowicz emphasizes:

“the authorities of the People’s Republic of Poland never fulfilled or intended to fulfill the basic postulate of the Lemkos – to recognize them as a national minority. At most, they created an illusion for activists that such decisions were possible in the future, but these actions were only conditioned by the needs of current policy towards Ukrainians. In practice, Lemkos were never treated otherwise than as part of the Ukrainian ethnoses”<sup>231</sup>.

The situation began to change in 1989, even before the 4 June elections. On 5 February 1989, the founding meeting of the Lemko Association (Stowarzyszenie Łemków) was held in Legnica, which became the first post-war Lemko organization. Andrzej Kopcza became the chairman. The main objective of the Association was the integration of Lemkos regardless of their views and religious beliefs, nurturing, development and dissemination of Lemkos’ spiritual and material culture, teaching the Lemko language, popularizing the history of Lemkivshchyna, as well as knowledge about the life and activities of Lemkos outside the country<sup>232</sup>.

As a counterbalance to the Lemko Association, on 30 December 1989 Ukrainophiles created their own organization in Gorlice – the Lemko Union (Zjednoczenie Łemków). Teodor Gocz became the chairman. The aim of the organization was, among other things, to integrate the Lemko population dispersed on Polish territory. The organization preached the slogan of respecting the rights of Lemkos regardless of their religious affiliation and whether they defined themselves as “Lemkos” or “Lemkos-Ukrainians”. As soon as the Lemko Union was registered, a rivalry between two opposing national orientations began<sup>233</sup>. It was exacerbated after the takeover of the “Lemko Vatra” in Zdynia by the Ukrainian option<sup>234</sup>.

230 M. Pecuch, *Wpływ szkolnictwa na procesy akulturacji, asymilacji i rekulturacji Łemków*. “Rocznik Lubuski”, 30, part 1, 2004, p. 135.

231 E. Mironowicz, *Problem łemkowski w polityce władz PRL*, [in:] *Łemkowie, Bojkowie, Rusini – historia, współczesność, kultura materialna i duchowa*, (eds.) S. Dudra, B. Halczak, A. Ksenicz, J. Starzyński, *Łemkowski Zespół Pieśni i Tańca “Kyczerza”*, Legnica-Zielona Góra 2007, p. 258.

232 A. Tyda, op. cit., p. 88; see more: *Statut Stowarzyszenia Łemków*. Available at: <https://www.stowarzyszenielemkow.pl/web/stowarzyszenie-lemkow/statut-sl/> (access: 25.06.2023).

233 H. Duć-Fajfer, *Łemkowie w Polsce*. “Magury’91”, Warszawa 1992, p. 30.

234 S. Dudra, *Poza małą ojczyznę...*, p. 216. “Vatra” has been held in the Lemko area since 1982. It is a three-day festival during which all areas of Lemko culture are presented: folklore, music, material art, *ibidem*, p. 209.

## Lemkos in the educational system in Poland after 1989

After 1989, Lemko organizational life underwent dynamic development and a natural process of pluralization. In addition to the organizations mentioned above, other Lemko-associated initiatives were soon established. Among the most important are the Ruthenian Democratic Circle of Lemkos “Hospodar”, the “Ruska Bursa” Association, the Association of the Song and Dance Ensemble “Kyczera”, the Association of Lovers of Lemko Culture in Strzelce Krajeńskie, the Association for the Development of the Museum of Lemko Culture in Zyn-dranowa, the Foundation for the Support of the Lemko Minority “Rutenika”, the Association “Terka Karpacka”, the Association of Lemko Youth “Czuha”<sup>235</sup>. Despite the existing organizational fragmentation, the activities of Lemko associations fulfill important integrative and educational functions<sup>236</sup>.

The Lemko Association in its statute among the five basic objectives listed “teaching the Lemko language”<sup>237</sup>, it also set up an Educational Commission, through whose efforts survey textbooks for teaching the Lemko language were developed and published.

The teaching of the Lemko language was introduced into the Polish educational system at the beginning of the school year 1991/1992. The first Lemko language teaching point was organized in September 1991 at the Primary School in Uście Gorlickie (Ruskie) and then at the school in Kunkowa. In Legnica, on the other hand, Łukasz Woźniak started teaching unofficially, outside the school, in a room of the Lemko Association. Subsequently, similar classes were introduced in Krynica, Rozdziel and further schools in Lemkivshchyna, where a small part of Lemkos (about 7%) returned after 1956, with time also in the lands of displacement<sup>238</sup>. Mirosław Pecuch points out that the teaching of Lemko language became competitive with the existing Ukrainian language teaching points. This process was linked to the separation of Lemkos from the Ukrainian minority in Poland<sup>239</sup>.

After ten years, in the school year 2000/2001, according to Mirosława Chomiak, teaching of the Lemko language was conducted in primary schools in: Uście Gorlickie (7 pupils), Kunkowa (6 pupils), Bielanka (6 pupils), Gładyszów

235 S. Dudra, *Łemkowie*, [in:] *Stowarzyszenia mniejszości narodowych, etnicznych i postu-  
lowanych w Polsce po II wojnie światowej*, (eds.) S. Dudra, B. Nitschke, Nomos, Kraków 2013,  
p. 286.

236 Attempts were made to consolidate all Lemko organizations. In 1995 an initiative was put  
forward to establish a Federation of Lemko organizations. However, despite common goals  
and several meetings, the federation was not established, S. Dudra, op. cit.

237 *Statut Stowarzyszenia Łemków...*

238 H. Duć-Fajfer, *Szkolnictwo na Łemkowszczyźnie*. “Річник Рускої Бурсы”, 2006; H. Duć-  
Fajfer, *Historia i sytuacja języka łemkowskiego...*, pp. 55–56.

239 M. Pecuch, op. cit., p. 135.

(10 pupils), Zdynia (12 pupils). Rozdziel (8 pupils), Kryg (7 pupils), Bodaki and Bartne (9 pupils) and Krynica (12 pupils). At the lower secondary level, teaching was carried out in Uście Gorlickie (6 pupils), Gładyszów (4 pupils) and Krynica (5 pupils), while at the upper secondary level in Marcin Kromer High School No. 1 in Gorlice (31 pupils)<sup>240</sup>. In the areas where Lemkos were resettled under the Operation “Vistula”, Lemkos were taught in primary and middle schools in Legnica (about 30 pupils), in primary schools in: Leszno Górne (12 pupils), Przemków (15 pupils), Brzoza (about 25 pupils) and in the middle school in Strzelce Krajeńskie (7 pupils)<sup>241</sup>.

Initially, the Lemko language was taught by priests and teachers of various subjects who knew the language. In July 2000, the Lemko Association organized, in cooperation with the Ministry of National Education and the Batory Foundation, the so-called “course-conferences” for teachers of the Lemko language. The training programme included lectures and exercises on grammar of the Lemko language, Lemko literature and teaching methodology. Teachers with pedagogical preparation had the opportunity, after passing the course in the form of a colloquium, to receive educational certificates authorizing them to teach the Lemko language. The course conference was attended by nearly 40 people, including academics, teachers of the Lemko language, PhD students,

240 Ewa Pogorzała’s research shows that the Lemko language is taught at Marcin Kromer High School No. 1 in Gorlice but it is also difficult to identify the second secondary school in which, according to Central Statistical Office (GUS) data, Lemko language was taught in the school year 2007/2008. Most likely, the second group or team in the Gorlice secondary school was included, E. Pogorzała, *op. cit.*, p. 206.

241 E. Pogorzała, *Nauczanie języka lemkowskiego w polskim systemie oświaty*, [in:] *Lemkowie, Bojkwowie, Rusini – historia, współczesność, kultura materialna i duchowa*, vol. 2, (eds.) S. Dudra, B. Halczak, I. Betko, M. Smigel, Druk-Ar, Zielona Góra-Słupsk 2009, p. 205. Information on the teaching of the Lemko language in the Polish educational system appeared as early as the first half of the 1990s, but was not included in the data of the Central Statistical Office (GUS), which is an attempt to comprehensively capture the statistical picture of education for minorities in Poland. According to GUS data, teaching of the Lemko language at the level of primary education did not begin until the school year 1997/1998 (4 teaching teams, 51 students). According to GUS data, the Lemko language was also taught at the level of secondary education, but it was only in the data for the school year 2003/2004 that the teaching of this language was recorded in one secondary school for 13 students. The problem of the reliability of statistical information on the scale of teaching of minority languages, including Lemko, was raised in the 2002 publication of the Helsinki Foundation for Human Rights. “The Right to Education. Monitoring Report”. Difficulties in establishing precise data on the scale of Lemko language teaching in the Polish educational system are also due to the fact that in the initial period after the introduction of Lemko language teaching in schools, it was common to include teams of this language in statistical statements with data on Ukrainian language teaching, *ibidem*, pp. 205–207.

students and secondary school graduates interested in the Lemko language. The idea of organizing the course-conference came from Michał Sandwicz<sup>242</sup>.

The situation and legal status of the Lemko language was regulated with the implementation of the Act of 6 January 2005 on National and Ethnic Minorities and Regional Language. Under this act, Lemkos gained the status of an ethnic minority and their language became one of the 15 recognised minority languages in Poland<sup>243</sup>.

For a long time Lemko language teachers were deprived of methodological assistance. Demands in this regard were repeatedly made at minority bodies. The main obstacle to organizing methodological assistance for teachers was the too low number of pupils, which made it impossible to employ a methodologist, even on a part-time basis. In the middle of 2008, representatives of the Lemko minority from the Gorlice district raised this issue with the Małopolska Voivode. He intervened with the Marshal's Office, which is responsible for methodological counseling. At the time, there were 5 Lemko language teachers employed in the Małopolska region. Eventually, a post of a Lemko language consultant was created and filled at the Teacher Training Centre in Nowy Sącz, operating within the Małopolskie Centrum Doskonalenia Nauczycieli<sup>244</sup>.

Lemko organizations, in particular the Lemko Association, the “Ruska Bursa” Association in Gorlice and the active (especially in the first decade of the 21st century) Lemko Youth Association “Czuha”, have undertaken a number of activities aimed at strengthening the position of the native language, its revitalization. These have been and are being carried out on many levels and not only to the extent resulting from the legal and institutional support of the state. In these activities, the Lemko language has the status of one of the four regional variants of the Ruthenian language (the native language of the Carpathian Ruthenians). Codification guidelines and programmes of practical measures to protect and develop the Ruthenian language were set during the World Congresses of the Ruthenian Language<sup>245</sup>. A momentous event, treated as a major codification fact, was the publication of “Gramatyka języka łemkowskiego” by Henryk Fontański and Mirosława Chomiak in 2000<sup>246</sup>. It was both the result of many years of shaping the norm of the written language and the basis for the

242 M. Chomiak, *O nauczaniu języka łemkowskiego w Polsce*. “Języki obce w szkole”, 6, 2001, p. 165.

243 H. Duć-Fajfer, *Historia i sytuacja języka łemkowskiego...*, p. 56.

244 E. Pogorzała, op. cit., p. 210.

245 K. Kororova, *Вступне Слово*, [in:] *Русинський літературний язык на Словакії: 20 років кодифікації: IV Міжнародний конгрес русинського языка: збірник реферетів*, Пряшів 23–25. 09. 2015, Пряшів 2015, p. 3B7.

246 H. Fontański, M. Chomiak, *Gramatyka języka łemkowskiego (Граматыка лемківського языка)*, Śląsk, Katowice 2000.

implementation in linguistic practice of the structures and phonetic, orthographic and spelling rules systematized in the “Grammar...”. structures and principles of phonetics, orthography, morphology and syntax. From the perspective of the last 30 years, it is possible to make a general reconnaissance of the directions of development and the effects of activities in the revitalization and strengthening of the Lemko language through cultural and linguistic practices<sup>247</sup>.

In the field of education, there is an upward trend in statistics showing the number of pupils choosing the Lemko language as an optional subject with the status of the mother tongue of the Lemko minority of 3 hours per week. It is taught at all levels of home education – from kindergarten to secondary school. In the 2019/2020 school year, according to official data from the Ministry of Education, the Lemko language was taught to 37 students in 4 kindergartens, 259 students in 23 primary schools, 16 students in 1 secondary school and 1 student in a technical school, for a total of 313 students in 29 schools. They were taught by 22 teachers<sup>248</sup>. Since 2013, Lemko pupils have benefited from the opportunity to take the minority mother tongue secondary school leaving exam. Declarations in this regard are made by 1–3 students per year. Teachers of the subject have developed a set of textbooks for teaching Lemko. It is worth noting, for the sake of ideological and qualitative continuity, that this teaching started with a basis in the form of the pre-war “Буквар” by Metody Trochanowski. Later, survey versions of textbooks published by the Lemko Association were used. In 2003, the Ministry of National Education and Sport, having approved a team of experts to review textbooks for teaching Lemko language, introduced the first textbooks for this subject into its publishing plan. Their publisher was the Foundation for the Support of the Lemko Minority “Rutenika”, which published 15 such textbooks between 2003 and 2006<sup>249</sup>. From 2001 at the Pedagogical Academy in Kraków (from 2008 at the Pedagogical University) until 2017, studies in the field of Philology were conducted with a specialization in Russian Philology with the Ruthenian-Lemko language<sup>250</sup>. At that time, the Lemko language appeared for the first time in the university space, where it functioned in a full philological dimension (first as a five-year degree programme, later as a three-year programme). The role of this course both in raising the prestige of the Lemko language and, through the education of a group of professionally prepared philologists-language scholars, in creating a cadre to undertake active

247 M. Brzezina, *Lemkowski w Polsce w aspekcie socjolingwistycznym*. “Socjolingwistyka”, 16, 1999; H. Duć-Fajfer, *Historia i sytuacja języka lemkowskiego...*, p. 56.

248 See more: *Nauka języków mniejszości narodowych, etnicznych i języka regionalnego*. Available at: <https://dane.gov.pl/pl/dataset/276,nauka-jezykowmniejzosci-narodowych-etnicznych-i-jezyka-regionalnego>, (access: 30.06.2023).

249 H. Duć-Fajfer, *Szkolnictwo na Lemkowszczyźnie*. “Річник Руской Бурсы”, 2006, pp. 64–65.

250 M. Chomiak, *O nauczaniu języka lemkowskiego w Polsce...*, p. 165.

revitalization activities in the area of Lemko language and culture, cannot be overestimated<sup>251</sup>. A significant problem was the question of funding for this course. Ryszard Siwek, Director of the Institute of Neophilology at the Pedagogical Academy in Cracow, informed that de facto, since 2001, the Ruthenian-Lemkian specialization had been maintained from the university's own funds, which was a huge financial burden on its budget. The authorities of the Pedagogical Academy at that time had applied for full financing of this course from the state budget and for separate regulations for the awarding of certificates. H. Duć-Fajfer also raised the problem of insufficient number of hours of classes in Lemko language, the number of which de facto did not allow to train a fully qualified teacher of this language<sup>252</sup>. In 2010–2011, at the philology department, in cooperation with the “Ruska Bursa” Association, teaching of the Lemko language for adults was also conducted, both stationary at the university and via e-learning as “Курс лемківського языка”<sup>253</sup>.

The teaching of the mother tongue undoubtedly influences awareness processes within a minority group. In the field of ethnology and anthropology, the influence of education on the processes of acculturation, assimilation and reculturation occurring in ethnic groups is analysed. In the context of the teaching of the Lemko language in the Polish educational system, the influence of this teaching on the processes of reculturation among the Lemko minority, i.e. striving to return to the native culture, abandoned or transformed in the processes of acculturation and assimilation, should be emphasized<sup>254</sup>.

## Conclusions

After the Second World War, the doctrine adopted for political purposes that Poland became an ethnically homogeneous country directed the authorities' actions towards diminishing the problem of minorities and attempting to adjust reality to the proclaimed theories. The political as well as cultural changes in Poland after 1989 had a positive impact on the recognition of minorities themselves, their languages and the educational policy in the state. In the period of democratization of the Polish state system, Lemko organizational life also underwent dynamic development and a natural process of pluralization. Lemko organizations were established, which to this day perform, among other things, educational functions.

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251 M. Watral, *W trosce o język rusińsko-łemkowski*. “Konspekt. Pismo Uniwersytetu Pedagogicznego w Krakowie”, 3 (40), 2011.

252 E. Pogorzała, op. cit., p. 210.

253 H. Duć-Fajfer, *Historia i sytuacja języka łemkowskiego...*, p. 57.

254 M. Pecuch, op. cit., p. 132.

The right to education for minorities in their mother tongue is constitutionally and statutorily guaranteed. The most important legal document is the Act on National and Ethnic Minorities and Regional Language of 2005. The path of the adoption and functioning of this act represented a lengthy process, which we can treat as an example of the democratization of public discourse in Poland. With its adoption, Lemkos gained the status of an ethnic minority and their language became one of the 15 recognised minority languages in the Polish state. The teaching of the Lemko language was introduced into the Polish educational system at the beginning of the 1991/1992 school year and to this day it has appeared at every level of education, including academic teaching. Moreover, young people in Polish schools have the opportunity to take the Lemko language as part of their secondary school leaving exams. Despite some difficulties and progressive assimilation, such an educational policy has been conducive to maintaining the Lemko identity and cultivating their traditions.

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## Chapter 5.

# Episodes in English education reform – from Thatcher to Brexit

### Introduction

Over the past few decades, there has been a growing trend in the UK and in many other countries to introduce reforms to the education system in order to better achieve educational goals. Benjamin Levin describes this phenomenon as an “epidemic” of global proportions<sup>255</sup>. Furthermore Braun, Maguire and Ball point out that education policymaking:

“(…) has been appropriated by the central state in its determination to control, manage and transform society and, in particular, reform and ‘modernise’ education provision and ‘raise standards’. To a great extent, in the UK and in England in particular, the role of the individual school, and indeed the local education authority, has been subordinated to and by these national policy imperatives”<sup>256</sup>.

The motivation for reforms is multifaceted, complex, and adaptive. It is impossible to ignore the intertwined role that neoconservatism and neoliberalism play. As pointed out by Steven J. Courtney and Bryan Mann: “the choices” of neoliberalism align with the hierarchies of neoconservatism<sup>257</sup>. Neoconservatism recalls earlier forms with similar objectives, mechanisms and modes of legitimation. Today, it is not found discretely from neoliberalism in the United States or in England but is in what Apple calls a “complicated alliance”<sup>258</sup>.

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255 B. Levin, *An epidemic of education policy: (What) can we learn from each other?* “Comparative Education”, 34 (2), 1998, pp. 131–41.

256 A. Braun, M. Maguire, S. J. Ball, *Policy enactments in the UK secondary school: examining policy, practice and school positioning*. “Journal of Education Policy”, 25 (4), 2010, p. 547.

257 A. J. Courtney, B. Mann, *Thinking with ‘lexical’ features to reconceptualize the ‘grammar’ of schooling: Shifting the focus from school to society*. “J Educ Change”, 22, 2021, pp. 401–421.

258 M. Apple, *Democratic education in neoliberal and neoconservative times*. “International Studies in Sociology of Education”, 21 (1), 2011, pp. 21–31.

An interesting international perspective is shared by Courtney and Mann, who refer back to a framework created by Tyack and Tobin<sup>259</sup> – they expand upon the original 1994 use of “grammars” to define the four core pillars that affect education systems. In Courtney and Mann’s work, they argue that it is necessary to shift the grammar of schooling away from what Tyack and Tobin say that “the regular structures and rules that organise the work of instruction” and instead focus on the discursive, not organisational nature of an educational system<sup>260</sup>. In an increasingly globalised world, this allows for the creation of an explanatory grammar that takes into account international features of schooling. In their article, Courtney and Mann defined a grammar in schooling as “a discourse or ideology that acts as the guiding structure across social institutions at a given period in a society”<sup>261</sup>.

Apart from neoliberalism and neoconservatism, Courtney and Mann identified two further grammars that influence schooling: industrialism and welfarism. They saw these as the four “distinctive discourses prevailing and sometimes recurring through various stages of the 20th century policymaking and social life”<sup>262</sup>. The following Table 4 creates a visual representation of the four grammars and how they interplay with expressions of organizational structure within schooling.

	Industrialism	Welfarism	Neoliberalism	Neoconservatism
Objectives of schooling	Efficiency	Equality	Economic growth	Elite reproduction
Mechanisms	Scientific Management	Purposive Mixing; Child-centered pedagogies	Marketization; Innovation	Hierarchized differentiation
Discursive legitimation	Efficiency	Fairness; Common good	Autonomy; Freedom; Choice	Eugenics

Table 4. The four grammars of schooling in the United States and England. Source: S. J. Courtney, B. Mann, under a Creative Commons Attribution 4.0 International License, p. 406.

Presenting this table, they also defined industrialism and welfarism in the context of the four meaning-making grammars. According to them, industrialism extends beyond its industrial provenance and makes its way into both culture and clearly, schooling. Welfarism, which took root thanks to Keynesian economics,

259 D. Tyack, W. Tobin, *The “grammar” of schooling: Why has it been so hard to change?* “American Educational Research Journal”, 31 (3), 1994, pp. 453–479.

260 S. J. Courtney, B. Mann, *Thinking with ‘lexical’ features to reconceptualize the ‘grammar’ of schooling: Shifting the focus from school to society.* “J Educ Change”, 22, 2020, p. 402.

261 Ibidem, p. 402.

262 Ibidem, p. 405.

affects schooling by focusing on equality as its objective and treating it as a common and public good. The nature of all four grammars is that they are deeply rooted within the culture and societies. They are not likely to undergo change without a massive ideological shift, meaning that they were present to one extent or another during England's educational reforms<sup>263</sup>.

These neoliberal ideas and policies have challenged equity through inclusion and public investments and services<sup>264</sup>. Andrea Joseph pointed out that “the study of neoliberalism in education relates to markets, free choice, competition, and personal responsibility as robust means to address education inequalities”<sup>265</sup>. The global preoccupation with the effectiveness of education systems can be linked to the worldwide dominance of neoliberalism<sup>266</sup>. The desire to improve educational outcomes can also be seen as correlating to a country's desire to become competitive in the “global knowledge economy”<sup>267</sup>. These neoliberal reforms, some argue, are the best way to achieve such competitiveness; according to Giddens, the combination of neoliberalism with a socially progressive agenda is the crux of the European Union's Lisbon Treaty<sup>268</sup>.

Education reforms that focus on the market typically involve giving parents a choice and promoting diversity in schools. This involves a funding model where money is allocated based on the number of students, encouraging schools to compete for students and increase their revenue<sup>269</sup>. Ravi Kumar and Dave Hill explain that the current historical moment is crucial as neoliberal capitalism is trying to modify essential terms such as “equality” for its interests. Although there is talk of “education for all”, the state's support for education is shrinking globally due to the growing impact of private capital<sup>270</sup>.

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263 Ibidem, p. 402.

264 H. M. Gunter, *The politics of education policy in England*. “International Journal of Inclusive Education”, 19 (5), 2015, pp. 1206–1211.

265 A. Joseph, *Navigating neoliberal school spaces: Parent and school staff perspectives on racially disproportional school exclusions in England*. “International Social Work”, 63 (4), 2020, p. 447.

266 A. Wilkins, *Neoliberalism, citizenship and education: A policy discourse analysis*, [in:] *The Palgrave Handbook of Citizenship and Education*, (eds.) A. Peterson, G. Stahl, H. Soong, Palgrave Basingstoke, 2018.

267 P. Rasmussen, K. Lynch, J. Brine, P. Boyadjieva, M. Peters, H. Sunker, *Education, Equality and the European Social Model*, [in:] *Globalisation and Europeanisation in Education*, (eds.) R. Dale, S. Robertson, Symposium Books, Oxford 2009, pp. 159–177.

268 A. Giddens, *Europe in the Global Age*, Polity Press, Cambridge 2007.

269 A. West, A. Ylönen, *Market-oriented school reform in England and Finland: school choice, finance and governance*. “Educational Studies”, 2010, 36 (1), p. 5.

270 R. Kumar, D. Hill, *Introduction: Neoliberal Capitalism and Education*, [in:] *Global neoliberalism and education and its consequences*, (eds.) D. Hill, R. Kumar, Routledge, NY 2009, p. 2.

Furthermore, Whitty and Wisby note that a question “(...) many commentators [in the UK] are now raising – after three decades of policy underpinned by diversity and choice agendas – is whether England still has an education system in place in the sense that had existed between the landmark 1944 Education Act and the 1979 Thatcher government”<sup>271</sup>. English state schools have undergone educational reforms since the 1980s<sup>272</sup>, which have brought in various managerial practices and accountability measures known as “performativity technologies”<sup>273</sup>.

## School reforms

Throughout the post-war period, there have been many attempts to reform England’s education system, with the express intention of going further productively. The list of education policy reforms that have been attempted over the last 80 years is quite extensive, and in recent years the UK (including England and Wales) has introduced a number of innovative reforms focused on the labour market and supporting individuals. The debate on education reform largely began when Jim Callaghan, former British Prime Minister, raised concerns about the quality of education in England after his grandchild was allegedly not being taught to read in primary school. This led to the Ruskin College Speech in 1976, which sparked a national debate<sup>274</sup>.

During the 1980s, the accomplishments of primary and secondary education in common schools were criticised, eventually resulting in the Education Reform Act of 1988. It was created to build on the previous Education Act of 1980 by enabling changes in school leadership, including conceptualisation and practices<sup>275</sup>.

These reforms were intended to hold schools accountable for their performance and improve the quality of education in England<sup>276</sup>. A. West and A. Ylönen

271 G. Whitty, E. Wisby, *Education in England – a testbed for network governance?* “Oxford Review of Education”, 2016, 42 (3), p. 324.

272 E. Towers, S. Gewirtz, M. Maguire, E. Neumann, *A profession in crisis? Teachers’ responses to England’s high-stakes accountability reforms in secondary education*. “Teaching and Teacher Education”, 2022, 117 (103778), pp. 1–10.

273 S. J. Ball, *The teacher’s soul and the terrors of performativity*. “Journal of Education Policy”, 18 (2), 2003, p. 215.

274 J. Callaghan, *A rational debate based on the facts*, 1976. Available at: <http://www.educationengland.org.uk/documents/speeches/1976ruskin.html> (access: 22.06.2023).

275 S. J. Courtney, *Corporatised leadership in English schools*. “Journal of Educational Administration and History”, 2015, 47 (3), p. 216.

276 P. Tymms, *Evidence? The impact of large-scale reform in England*, “Z Erziehungswiss”, 14 (1), 2011, p. 106.

pointed that in England, funding for schools used to be determined by local authorities based on the number and age of pupils. However, the 1988 Education Reform Act introduced a system where school governing bodies became responsible for budgets and deciding how resources are spent. Central government continues to regulate funding using a formula that factors in pupil numbers. The purpose behind this was to give schools autonomy and make them more competitive, which includes introducing corporate practices in schools, allowing schools to opt-out of local democratic control (first through obtaining grant-maintained status, and later through academisation), and thereby creating state-independent schools. These trends have been supported by legal requirements and guidance that can be seen as legalistic<sup>277</sup>.

Ross E. Dunn in his article *The Making of a National Curriculum: The British Case* pointed out that in general, the new educational plan deeply unsettled the issue of national identity. It is important to bear in mind that UK society is a multicultural society, so social inequalities, prejudices and stereotypes related to, for example, ethnic diversity, historical or religious backgrounds are not difficult here. During the 1980s and early 1990s, the customary definition of British identity had become uninspired and self-congratulatory as many immigrants entered the country and the expectation of using the euro currency drew nearer<sup>278</sup>. The same kind of economic and cultural changes were also being felt in the United States, with contentious history debates highlighting how public uneasiness about social changes, conflicts over versions of the national past, and disagreements about educational history policies were interconnected<sup>279</sup>. Ross E. Dunn also points out that many members of the Conservative Party embraced a cultural neo-conservatism that expressed a strong inclination towards what Phillip refers to as “moral panic”, a persistent fear of national disintegration and collapse caused by liberal attitudes, cultural relativism, globalisation, and the supposed disappearance of objective truth in the post-modern era. To address this crisis, neo-conservatives believed in reinforcing a set of values consisting of “authority, discipline, hierarchy, the nation, and strong government”<sup>280</sup>.

In the 1990s, England once more saw a spotlight on its educational system, this time shined by the New Labour Party<sup>281</sup>. Their reforms after 1997 combined devolution, diversity, choice, privatisation, centralised regulation, monitoring,

277 S. M. Rayner, H. M. Gunter, *Resistance, professional agency and the reform of education in England*. London. “Review of Education”, 18 (2), 2020, pp. 265–280.

278 R. E. Dunn, *The Making of a National Curriculum: The British Case*. “The History Teacher”, 33 (3), 2000, pp. 395–398.

279 Ibidem, p. 398.

280 Ibidem, p. 399.

281 C. Wilkins, *Education reform in England: quality and equity in the performative school*. “International Journal of Inclusive Education”, 1 (11), 2015, p. 3.

and even pedagogical prescription, going beyond the “new right settlement” Alastair Campbell, who served as Tony Blair’s spokesperson, declared that ordinary comprehensive schools were no longer adequate<sup>282</sup>.

Chris Wilkins notices:

“Despite the focus on teacher quality, the relationship between school improvement and the effectiveness with which schools address social equity issues has received comparatively little attention. This is particularly noteworthy in the English context, given that Tony Blair, prior to being elected as Prime Minister in 1997, stated that his policy priorities were ‘Education, education, education’ (Blair 1996), whilst Peter Mandelson, one of Blair’s key political allies, was noting that a key measure of the success of ‘New Labour’, as Blair had rebranded the Labour Party, would be whether Britain would be ‘a more equal society’ in 10 years’ time (cited in Hills and Stewart 2005). In 1999, Blair used the symbolically significant annual Beveridge Lecture on Social Justice (commemorating the ‘architect of the Welfare State’) to set out his government’s historic aim to be ‘the first generation to end child poverty’ (Blair 1999). New Labour education policy, therefore, set out to place social justice and equity issues at the heart of its education policy in its period in office between 1997 and 2010”<sup>283</sup>.

New Labour’s promises included “more creative combinations of public, private and voluntary solutions, top-down with bottom-up initiatives and professional engagement that did not extend to unrestricted licence”<sup>284</sup>. Following the New Labour Party’s descent from power, the Conservative-Liberal Coalition took office<sup>285</sup>.

Most recently, T Levels were created in 2020, and give students the opportunity to enter skilled employment, an apprenticeship, or a related technical study. Many of these reforms were motivated by the perceived poor achievement of pupils. Many reforms over the years have effectively narrowed what can be considered England’s “preferred curriculum” along the lines of neoliberal and neoconservative schools of thought, marginalising subjects such as drama, art, design, technology, and catering. One challenge for created policy is ensuring a whole-school approach, one that ensures high participation and raises achievements.

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282 J. Tooley, *Reclaiming Education*, Continuum, London 2020.

283 C. Wilkins, op. cit., p. 3.

284 S. J. Courtney, *Corporatised leadership in English schools*. “Journal of Educational Administration and History”, 47 (3), 2015, p. 217.

285 C. Wilkins, op. cit., p. 3.

## Thatcher's education reforms

McGuire pointed out that “rarely have changes to state funded education in the United Kingdom (UK) been as significant or lasting as during the 1970–1990 period, under the direction of Education Secretary, and then Prime Minister, Margaret Thatcher”<sup>286</sup>. However, this did not change the fact that Margaret Thatcher is the only Prime Minister to whom Oxford University refused to award an honorary degree<sup>287</sup> in protest at the “deep and systematic damage to the whole public education system in Britain”<sup>288</sup>. It is necessary to understand the influence of Thatcher's education secretaries in shaping policy at the time, especially Kenneth Baker. Thatcher granted him freedom to innovate, largely because they were often in agreement. It is worth noting that he was more radical in terms of educational reform.

Thatcher believed that education was an essential tool for building a strong economy and restoring Britain's place as a world power. She herself advocated for teaching patriotic history and instilling in children the ability to memorise “what actually happened”<sup>289</sup>. At the same time, Thatcher believed that “too many teachers were less competent and more ideological than their predecessors”<sup>290</sup>. Pete Dorey noted that the Thatcherite critique of secondary education was part of a larger opposition to the public sector and welfare state. This critique had both neo-liberal and neo-conservative dimensions, with the former focusing on the limited choice and lack of competition in education due to the dominance of comprehensive schools. This lack of competition supposedly led to low standards and little incentive for improvement among teachers. The Thatcherite perspective favoured reducing the state's role in the economy while expanding its role in restoring social discipline and traditional morality<sup>291</sup>.

Thatcher's education reforms focused on improving teacher quality, increasing school competition, and emphasising core academic subjects in the curriculum. The reform also aimed to increase the autonomy of schools, improve

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286 J. M. McGuire, *Margaret Thatcher's UK School Reforms – Aims, Impact, and Legacy*. “Social and Education History”, 11 (3), 2002, p. 232.

287 A. Beauvallet, *Thatcherism and Education in England: A One-way Street?* “Observatoire de la société britannique”, 17, 2015, pp. 97–114.

288 B. Simon, *Education and the Social Order 1940–1990*. “Lawrence and Wishart”, London 1991, p. 551.

289 R. E. Dunn, *The Making of a National Curriculum*, p. 396.

290 M. Thatcher, *The Downing Street Years*, HarperCollins., London 2012, p. 590.

291 P. Dorey, *The Legacy of Thatcherism for Education Policies: Markets, Managerialism and Malice (towards Teachers)*, [in:] *The Legacy of Thatcherism: Assessing and Exploring Thatcherite Social and Economic Policies*, (eds.) S. Farrall, C. Hay, British Academy Original Paperbacks, London 2014, p. 110.

standards, and create greater choice for parents and pupils<sup>292</sup>. This reform included the establishment of 20 City Technology Colleges (CTCs).

As Tony Edwards noted, they were meant to:

“(…) offer a ‘new choice of school’ providing a broadly based secondary education ‘with a strong technological element’ for 11–18 year olds in urban areas. They were to be independent of LEAs and receive their recurrent funding from central government, while ‘all or a substantial part’ of their capital costs would be met by private sponsors. It was anticipated that they would act as ‘beacons of excellence’ and influence other inner city schools”<sup>293</sup>.

Furthermore, Edwards notes that these CTCs strongly aligned with Thatcher’s interests, as they were fitting for a society governed by markets rather than bureaucracies. However, they were controversial from the early stages, and proved difficult to implement<sup>294</sup>.

The next significant achievement under Thatcher’s leadership was the creation of the National Curriculum in 1988. It was designed to ensure that all children received a broad and balanced education, regardless of where they lived or which school they attended<sup>295</sup>. Another key aspect of Thatcher’s education reform agenda was the introduction of grant-maintained schools. These were schools that were funded directly by the government, rather than through local authorities. This gave them greater autonomy in terms of things like setting their own budgets and deciding on their own admissions policies. The idea was that this would encourage competition between schools and lead to higher standards<sup>296</sup>.

A further education reform was the introduction of a national teacher training program. This program aimed to raise the quality of teaching in the country by setting higher standards for teacher certification. Under Thatcher’s guidelines, all newly appointed teachers were required to complete a rigorous training program that focused on pedagogical techniques and subject knowledge<sup>297</sup>. The program aimed to ensure that teachers had the skills and knowledge necessary to provide high-quality education to their students. It is also impossible not to

292 C. E. Finn, *Margaret Thatcher, Education Reformer*. Available at: <https://www.educationnext.org/margaret-thatcher-education-reformer/> (access: 10.06.2023).

293 T. Edwards, S. Gewirtz, G. Whitty, *Researching a policy in progress: the city technology colleges initiative*. “Research Papers in Education”, 1992, 7 (1), p. 79.

294 *Ibidem*, p. 79.

295 G. Whitty, S. Power, *Quasi-Markets and Curriculum Control: Making Sense of Recent Education Reform in England and Wales*. “Educational Administration Quarterly”, 33 (2), 1997, pp. 219–240.

296 Y. Hirakata, *Education Reform under the Thatcher Government and Hayek’s Thought on Welfare State: Market Mechanism and Managed Competition*. “Discussion paper”, 2016. Available at: <https://www.kyusan-u.ac.jp/keizai-kiyo/dp74.pdf> (access: 10.06.2023).

297 D. Gillard, *Education in England: a history. Thatcher and the New Right*, 2018. Available at: [www.educationengland.org.uk/history](http://www.educationengland.org.uk/history) (access: 10.06.2023).

notice that during Thatcherism the public sector professions, including teachers, were criticised for abusing their autonomy to the detriment of pupils and society. In England, the 'liberal educational establishment' which included teachers, Local Education Authorities, and universities, was viewed as having left-leaning views and using questionable teaching methods. These methods were blamed for reducing standards. As a result, trust in teachers was eroded, which enabled educational reform to take place<sup>298</sup>.

Another significant aspect of Thatcher's education reforms was the introduction of school competition. Her government introduced measures to allow parents and students greater choice in the schools they attended. In theory, this meant parents were given the ability to choose from a wide range of schools, including ones outside of their catchment areas. Through this measure, Thatcher hoped to create a more competitive education system, where schools would have to work harder to attract and retain students, ultimately leading to improved outcomes<sup>299</sup>. However, the results of the change were not always aligned with their purpose. This new influx of choices was not one given to children and parents in rural areas, and the legacy of that is still felt today, as the school-choice policies remain in effect. Catchment area remains important, and schools choose pupils as much as, or more than pupils and parents choose them due to geographical, faith or other constraints<sup>300</sup>.

## Brexit and its effect on schools

Both primary and secondary education were affected after Brexit. One of the most obvious impacts has been the decline in European teachers seeking to work in the UK, with official figures showing that there has been a notable decrease<sup>301</sup>. This decline can be attributed to the increase in paperwork and considerable hoops that teachers from the EU have to jump through to acquire visas and ensure their right to work in the UK. This has led to a shortage of experienced European teachers in UK schools, as many potential candidates are now choosing not to apply for jobs in the UK. In light of the shortage of EU teachers, non-EU nationals can apply for a Skilled Worker visa up to three months before starting work in the UK. While this is an available solution, there is no certainty about the

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298 G. Whitty, E. Wisby, *Moving beyond recent education reform – and towards a democratic professionalism*. "Hitotsubashi Journal of Social Studies", 38 (1), 2006, p. 45.

299 R. Saron, *Education policy under the Thatcher government*. "Aust. Educ. Res.", 15, 1988, pp. 55–63.

300 Ibidem, pp. 57.

301 *How has Brexit affected schools and colleges?* Available at: <https://app.croneri.co.uk/feature-articles/how-has-brexit-affected-schools-and-colleges> (access: 22.06.2023).

long-term impact on teaching standards and international education for students in the UK. The process also adds more requirements and red tape, which can be time-consuming and difficult to navigate. Additionally, employers need to be licensed by the Home Office, which significantly limits job opportunities. The proposed recruit also needs to be well-versed in the English language and receive the minimum salary requirements set out by the government<sup>302</sup>. Conversely, this issue also arises in the opposite direction, as teachers from the UK can no longer move to EU countries and apply for teaching jobs on the same terms as their local counterparts.

The uncertainties surrounding Brexit were also compounded by the coronavirus pandemic, shuttering many places of learning and moving education into homes and out of schools. This difficult period was not entirely regarded as negative, however, as some likened it to a ‘hard reset’ that the country’s educational system needed. An interesting perspective came from Richard Silver in his article from *The Times*:

“Yet the pandemic has also created an extraordinary opportunity. This should be a reset moment, like the one triggered by the Second World War. Rab Butler described the 1944 Education Act, which ushered in ‘secondary education for all’, as the embodiment of ‘One Nation Conservatism’. If the government is to achieve its objectives of levelling up the disadvantaged areas and creating a buccaneering, entrepreneurial nation after Brexit then there must be a similar transformation now in how children learn. Collins’s mistake was to focus on the money; what is needed is reform”<sup>303</sup>.

## Tertiary education reforms in the UK

Margaret Thatcher’s ‘revolutionary’ reforms helped to transform an ailing university system into a world-leading higher education system, a vice-chancellor has said<sup>304</sup>.

Around the world, the higher education industry is currently undergoing a tumultuous period of change, involving reforms aimed at corporatisation, com-

302 Ibidem.

303 R. Sylvester, *What’s wrong with our schools – and how to reinvent them for the digital age*, 2022. Available at: <https://www.thetimes.co.uk/article/times-education-commission-how-we-can-reinvent-schools-for-the-digital-age-ltjcp75mf> (access: 27.06.2023).

304 *Thatcher had ‘immense impact’ on higher education*. Available at: <https://www.timeshighereducation.com/news/thatcher-had-immense-impact-on-higher-education/2003059.article> (access: 10.06.2023).

modification, and significant restructuring of universities and the wider higher education sector<sup>305</sup>.

The ethos in higher education has transformed from collegial to managerial due to the influence of neoliberal ideology, which aims to commodify resources and promote capital accumulation. State-funded institutions like universities are viewed as inefficient and in need of ‘market’ discipline. The focus on benefiting managers in this approach often comes at the expense of pedagogical matters, leading to a divide between the academic labour force and neoliberal managerial elite<sup>306</sup>. Linda Evans notes that:

“(...) the UK’s universities – along with those in many European countries – have, over the last two decades or so, fitted themselves out with what are generally considered the trappings of neoliberalism: new public management, performativity, competitiveness, consumerism, and the commodification of services and personnel”<sup>307</sup>.

The notion of the ‘consumer’ plays a vital role in this context. Neoliberals believe that the world is essentially a vast supermarket, where ‘consumer choice’ is the key to democracy. Hence, they view education as just another commodity – similar to bread, cars, and television<sup>308</sup>.

“On the other hand, according to Nick Hilmanthe Director of HEPI (The Higher Education Policy Institute) education authorities never perceived students as ‘consumers’. Although they observed some similar mechanisms within the framework of education, they avoided comparing scholar system to a supermarket. Moreover, Hilmann points out that ‘the rise of managerialism in autonomous UK universities has all that much to do with governments tending towards neoliberalism, rather that that managerialism was a necessary response to universities becoming very much bigger as we moved to a mass system of higher education”<sup>309</sup>.

Since the early 1980s, higher education in the UK, specifically in England, has undergone a process of marketisation. This process includes various steps such as the creation of CTCs, introduction of ‘top-up’ loans for student support, the abolition of the line between universities and polytechnics, and the introduction

305 M. Ivancheva, I. Syndicus, *Higher education reform in the “periphery”*. “Learning and Teaching”, 12 (1), 2019, p. 1.

306 A. M. Taberner, *The marketisation of the English higher education sector and its impact on academic staff and the nature of their work*. “International Journal of Organizational Analysis”, 26 (1), 2018, pp. 129–130.

307 E. Linda, *Re-shaping the EHEA After the Demise of Neoliberalism: AUK-Informed Perspective*, [in:] *European Higher Education Area: The Impact of Past and Future Policies*, (eds.) A. Curaj, L. Deca, R. Pricopie, Springer Cham, 2018, p. 23.

308 M. Apple, *Between neoliberalism and neoconservatism: Education and conservatism in a global context*, [in:] *Globalization and education: Critical perspectives*, (eds.) N. Burbules, C. Torres, New York 2002, p. 60.

309 An excerpt from Nick’s statement during our email conversation.

of ‘top-up’ tuition fees<sup>310</sup>. Simultaneously, there have been efforts to reform higher education towards corporatization, such as remodeling university governing bodies based on corporate lines and creating performance indicators for the sector<sup>311</sup>.

It is also worth pointing out that Thatcher’s government adopted a market-oriented approach, which led to the introduction of tuition fees, the development of research funding and the expansion of private higher education institutions. While her policies were controversial and criticised by some, they fundamentally changed the landscape of British higher education and continue to shape it today<sup>312,313</sup>. According to Hilmann:

“In fact, she and John Major left the sector in a bit of a mess because it had grown massively without the funding reforms necessary to pay for that growth, leading in 1997 to the cross-party Dearing review, which paved the way for Labour to reintroduce fees for full-time undergraduates”.

Further reforms were even more significant in nature<sup>314</sup>. As mentioned above, in response to declining university education quality and rising costs, in 1998, the Labour Government introduced tuition fees of £1000 for higher education students across the UK<sup>315</sup>. This led to concerns over the affordability of higher education, particularly for students from low-income backgrounds. In response to this, the government introduced new measures to increase financial support for students, including bursaries and scholarships<sup>316</sup>. As Ghazala Azmat Stefania Simionnoted, in 2006, the Higher Education Act 2004 went into effect, creating three major changes to the tuition regime: “first, all students – irrespective of

310 R. Brown, *The marketisation of higher education: issues and ironies*. Available at: <https://repository.uwl.ac.uk/id/eprint/3065/1/The%20marketisation%20of%20Higher%20education.pdf> (access: 22.06.2023).

311 R. Brown, *The corporatisation of university governance*, University of West London, London 2012. Available at: [http://www.uwl.ac.uk/instil/research/Occasional\\_pages.jsp](http://www.uwl.ac.uk/instil/research/Occasional_pages.jsp) (access: 10.06.2023).

312 J. Grove, *Thatcher had ‘immense impact’ on higher education*. Available at: <https://www.timeshighereducation.com/news/thatcher-had-immense-impact-on-higher-education/2003059>. article (access: 10.06.2023).

313 S. Tannock, *When the demand for educational equality stops at the border: wealthy students, international students and the restructuring of higher education in the UK*. “Journal of Education Policy”, 28 (4), 2013, pp. 449–464.

314 G. Azmat, S. Simion, *Higher Education Funding Reforms: A Comprehensive Analysis of Educational and Labor Market Outcomes in England*, IZA – Institute of Labor Economics, 2017.

315 J. Gallacher, D. Raffé, *Higher education policy in post-devolution UK: more convergence than divergence?* “Journal of Education Policy”, 27 (4), 2012, p. 471.

316 *Fairer higher education system for students and taxpayers*. Available at: <https://www.gov.uk/government/news/fairer-higher-education-system-for-students-and-taxpayers> (access: 10.06.2023).

household income – were obliged to pay tuition fees; second, universities were given discretion over the level of tuition fees charged; third, the maximum amount of tuition fee trebled to £3,000 per year (inflation indexed)<sup>317</sup>. They further note that it only had a small effect on enrolment<sup>318</sup>. According to Nicholas Hillman, “higher education in England has undergone dramatic change in recent years, particularly in relation to the funding of undergraduate study and, as with schooling, the diversity of provision”<sup>319</sup>. One such example is the lifting of the cap on tuition fees in 2012, allowing universities to charge up to £9,000 per year for undergraduate courses<sup>320</sup>.

Another significant reform in higher education has been the introduction of the Teaching Excellence Framework (TEF), which assesses student outcomes and the quality of teaching and learning at universities. This was introduced in 2017, with the aim of providing students with better information about the universities they are considering attending, and to drive up standards of excellence across the sector<sup>321</sup>. The TEF has been controversial, with concerns raised about its methodology and its potential impact on university funding, but it remains an important initiative in higher education reform in the UK<sup>322</sup>. The government has also introduced measures to improve access to higher education for students from disadvantaged backgrounds, including the introduction of contextual admissions policies and the expansion of outreach programmes. Universities are now required to report on their progress in improving access and participation, and there are targets in place to increase the number of students from under-represented groups<sup>323</sup>. Further government initiatives include the introduction of Degree Apprenticeships and the Higher Education Enterprise Zone (HEEZ) programme to encourage universities to work more closely with employers and to provide students with practical, job-focused skills<sup>324</sup>.

Of equal – or perhaps greater – importance than the TEF is the Research Excellence Framework (REF), which allocates research funding based on assessments made every seven years. First used in 2014, its existence has led to some

317 G. Azmat, S. Simion, op. cit., p. 6.

318 Ibidem, p. 6.

319 N. Hillman, *The Coalition's higher education reforms in England*. “Oxford Review of Education”, 42 (3), 2016, p. 330.

320 Ibidem, p. 330.

321 A. Gunn, *The UK Teaching Excellence Framework (TEF): The Development of a New Transparency Tool*, [in:] *European Higher Education Area: The Impact of Past and Future Policies*. Sprunge, (eds.) A. Curaj, L. Deca, R. Pricopie, 2018, pp. 505–526.

322 A. Gunn, *The return of the (revised) Teaching Excellence Framework*. Available at: <https://www.universityworldnews.com/post.php?story=20230529143524345> (access: 10.06.2023).

323 P. Bolton, J. Lewis, *Equality of access and outcomes in higher education in England*. Available at: <https://commonslibrary.parliament.uk/research-briefings/cbp-9195/> (access: 22.06.2023).

324 *About University Enterprise Zones (UEZs)*. Available at: <https://www.gov.uk/government/publications/university-enterprise-zones/university-enterprise-zones> (access: 10.06.2023).

derision among scholars. According to R. Watermeyer and G. Derrick, the assessments “are also commonly associated with negative impacts, particularly relating to the well-being of academic staff”<sup>325</sup>. The REF’s funding methods have led universities to shape their assessment of researchers around their ‘REF-ability’, or their ability to provide a return on institutional REF investment<sup>326</sup>. In light of the pressures of being at the top of the ‘global knowledge economy’<sup>327</sup>. Watermeyer and Derrick argue that “Claims of greatness determined through a national assessment seem feeble in the global context”<sup>328</sup>.

Higher education in the UK has undergone a range of reforms in recent years with the aim of improving accessibility, quality and value for money. These reforms have included changes to funding arrangements, the introduction of the TEF, measures to improve access and participation, and initiatives to improve the links between universities and employers. While these reforms have been controversial at times, they represent an ongoing effort to strengthen the UK’s higher education sector and provide students with the best possible education<sup>329</sup>.

## Brexit and its effect on university

Interesting research regarding the emotional toll of Brexit was carried out by Marginson, S., Papatsiba, V. and Xu, X. In their article *Feeling the Brexit shock: European connectedness and the existential crisis in UK higher education*, focusing on emotions and uncertainty. They noticed that:

“Emotions are often overlooked in social research. But actions are not always based on rational calculation. Identity, values and organic ties to communities understood as a sense of belonging, all shape regret or resistance in the face of changes seen as negative, like Brexit in UK higher education”<sup>330</sup>.

Paolo Boccagni, Loretta Baldassar have observed that emotions can act as a bridge between the individual and the social, linking micro and macro levels of

325 R. Watermeyer, D. Derrick, *Why the party is over for Britain’s Research Excellence Framework*. “Nature”, 2022, p. ND.

326 Ibidem.

327 P. Rasmussen, K. Lynch, J. Brine, P. Boyadjieva, M. Peters, H. Sunker, *Education, Equality and the European Social Model*, [in:] *Globalisation and Europeanisation in Education*, (eds.) R. Dale, S. Robertson, Symposium Books, Oxford 2009, pp. 159–177.

328 R. Watermeyer, D. Derrick, op. cit.

329 A. Gunn, *The UK Teaching Excellence Framework (TEF): The Development of a New Transparency Tool*, [in:] *European Higher Education Area: The Impact of Past and Future Policies*, (eds.) A. Curaj, L. Deca, R. Pricopie, Springer, 2018.

330 S. Marginson, V. Papatsiba, X. Xu, *Feeling the Brexit shock: European connectedness and the existential crisis in UK higher education*, [in:] *Changing Higher Education for a Changing World Bloomsbury*, (eds.) C. Callender, W. Locke, S. Marginson, 2020, pp. 67–83.

social reality, agency and structure, private and public, and bodies and places<sup>331</sup>. Marginson, Papatsiba and Xu found that participants expressed a range of emotions, with negative emotions being more prevalent than positive ones. Many interviewees expressed fears and worries about the consequences of Brexit on individuals, institutions, and the wider community, with a particular concern about loss of diversity and collaboration. Many participants also expressed a sense of loss of personal agency and displacement. The research indicates that emotions are an important factor that needs to be considered in discussions around Brexit and its impact on higher education<sup>332</sup>.

The UK government was unprepared for the impact that deciding to leave the European Union would have on higher education and research. The uncertainty of how these strongly pro-European sectors would be affected lasted for three and a half years during the negotiation of the UK's departure from the EU, with implementation taking another four and a half years. The Withdrawal Agreement, implemented in January 2021, ended freedom of movement, categorising EU27 students as international students subject to high third country fees, and researchers faced changes in working conditions with EU partners<sup>333</sup>.

Prior to the Withdrawal Agreement, scholars such as Ken Mayhew noted concerns Brexit could have an impact on Higher Education, particularly in terms of:

- (i) the number of EU students attending UK universities;
- (ii) the sector's ability to retain and recruit academics from EU countries;
- (iii) the possible loss of access to EU research funding;
- (iv) the ease with which UK students would be able to study in Europe<sup>334</sup>.

Over six years after the referendum, many of these concerns did not materialise. However, it certainly affected EU students being charged full foreign fees and "stopped being entitled to tuition fee loans subsidised by UK taxpayers, meaning they had to find the money for their fees upfront"<sup>335</sup>.

Others remain uncertain, such as the terms of the UK's association with Horizon Europe. The COVID-19 pandemic has also worsened the already unstable financial state of some HE institutions, and the Department for Education

331 P. Boccagni, L. Baldassar, *Emotions on the move: Mapping the emergent field of emotion and migration*. "Emotion, Space and Society", 16, 2015, p. 74.

332 S. Marginson, V. Papatsiba, X. Xu, op. cit., p. 76.

333 A. Corbett, L. Hantrais, *Higher education and research in the Brexit policy process*. "Journal of European Public Policy", 2023, p. 12.

334 K. Mayhew, *Brexit and UK higher education*. "Oxford Review of Economic Policy", 38 (1), 2022, Spring, pp. 179–187.

335 An excerpt from Nick's statement during our email conversation.

is considering funding system reform that may lead to less support for degree-level studies<sup>336</sup>.

Following the Brexit referendum, many EU nationals based in the UK expressed concern about the legal status of themselves and their families. Concerns were also raised about the possible implications for collaborations with colleagues in continental European universities. However, these anxieties proved not to cause insurmountable problems in recruiting staff from outside the EU. By 2019–20, the percentage of EU staff had hardly changed from pre-referendum levels, and the percentage from other parts of the world actually increased. The immigration rules now provide a less hostile environment for foreign academics wishing to work in the UK, and new visa routes are being created to attract talent in science, research and technology. However, there are still concerns about recruitment of staff from Europe due to Brexit's impacts on funding and collaborative activity<sup>337</sup>.

One significant impact of Brexit on higher education has been on funding.<sup>338</sup> Prior to Brexit, many universities received significant funding from the European Union, which they used to support research projects, academic collaborations and student exchange programs. To make up for the lack of EU funding, the UK government has introduced a funding guarantee for all successful UK projects in Horizon Europe, which has been extended multiple times and is currently in place until March 31, 2023. Eligible applicants receive full funding at their UK host institution for the lifetime of the grant. Similar guarantees were previously applied during Brexit negotiations. 'Plan B' could be activated if needed, as outlined in the BEIS document, to support UK R&D and collaborative research beyond European programs<sup>339</sup>. Ken Mayhew, described the plan as follows:

“The good news is that the UK has negotiated associate status with Horizon Europe, which is scheduled to run from this year until the end of 2027 and is the successor to Horizon 2020. Horizon Europe will dispense funds under three ‘pillars’ [...] The bad news is that, although many details have yet to be finally agreed, it appears that the UK has secured a bad deal. It seems clear that the country will be contributing more to the programme than it did to Horizon 2020. Furthermore, if UK researchers win more than 8 per cent of the UK's contribution in two successive years, then the UK will have to pay back the difference. This is important since historically the UK was by far the most successful bidder under the Framework Programme 7 and Horizon 2020. However,

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336 Ibidem, p. 179–182.

337 K. Mayhew, *Brexit and UK...*, pp. 183–184.

338 K. Mayhew, *UK higher education and Brexit*. “Oxford Review of Economic Policy”, 33 (1), 2017, p. 157.

339 L. Highman, S. Marginson, V. Papatsiba, *Higher education and research: multiple negative effects and no new opportunities after Brexit*. “Contemporary Social Science”, 18 (2), 2023, pp. 216–234.

since 2016 there has been a fall in grant applications and the UK has sunk from first to fifth in the share of funding it receives<sup>340</sup>.

Concerning student mobility, the UK government ceased its involvement in the Erasmus student mobility program in 2020 and introduced the Turing scheme. Erasmus had promoted both British students studying abroad and European students coming to the UK, but Turing only advocates for British students studying overseas<sup>341</sup>.

## Conclusion

Throughout the post-war period, there have been many attempts to reform England's education system, with the express intention of going further productively. The list of education policy reforms that have been attempted over the last 80 years is quite extensive, and in recent years the UK (including England and Wales) has introduced a number of innovative reforms focused on the labour market and supporting individuals. In the 1980s, Margaret Thatcher's education reform were an attempt to marketize the British education system to raise standards. Their main purpose was to improve teacher quality, increase school competition, and emphasise core academic subjects. They also faced criticism and backlash from some who felt that they perpetuated inequalities and neglected the needs of certain groups of students. Overall, Thatcher's impact on education in the UK remains a topic of debate and discussion. In the present day, despite the uncertainties created pre- and post-Brexit around education, the UK's decision to leave the EU did not significantly alter education. However, it did affect EU student's tuition fees and result in some concerns regarding a teacher shortage in the UK. One can agree with Wilkins' assertion that the consequences of reforms thus far have been discouraging for social justice advocates<sup>342</sup>. As noted earlier, the four grammars that defined schooling throughout the 20th and 21st century are unlikely to change without a global ideological shift. In this way, neoliberalism, neoconservatism, welfarism, and industrialism are likely to drive further educational reforms on both school and university levels.

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340 K. Mayhew, *Brexit and UK...*, p. 185.

341 S. Zotti, *Academic mobility after Brexit: Erasmus and the UK post-2020*. "European Journal of English Studies", 25 (1), 2021, pp. 19–33.

342 C. Wilkins, op. cit.

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## Chapter 6.

# Reform of Chinese shadow education. Competition, hùkǎo, and Double Reduction Policy

## Introduction

In 2021, the People's Republic of China announced a Double Reduction Policy (双减政策 *shuāng jiǎn zhèng cè*) aimed at regulating the private education sector. Based on the review of selected literature, the author will first explain the meaning of the term “shadow education” used in the title. Next, the chapter will present two critical aspects through which we can view the Chinese government's education policy regarding the recent reform of shadow education. The first of these aspects is the competitiveness of the Chinese education system, and the second is the household registration system. Competitiveness inherited from the Confucian educational tradition is one of the characteristics of the modern Chinese education system. It manifests, among others, through selective exams at the end of lower secondary and upper secondary education. The high school entrance exam, 中考 *zhōngkǎo*, is one of the first necessary exams on the way to completing one's academic education. Another is known as 高考 *gāokǎo*, an exam qualifying students for the university level of education. Both exams are ubiquitous aspects of student life in Chinese academic schools. As in other Asian countries such as Singapore<sup>343</sup>, Japan<sup>344</sup>, Hong Kong<sup>345</sup>, and South Korea<sup>346</sup>,

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343 See: H. K. Weng, M. Tan, *Challenges to Social Mobility in Singapore*, [in:] *The Singapore Economy: Designing Its Dynamism and Inclusion*, (ed.) H. T. Hoon, Routledge, 2021; I. Nowosad, *Singapur. Azjatycki tygrys edukacyjnych reform. Fenomen makropolityki oświatowej*, Impuls, Kraków 2022.

344 See: H. Kondo, *Education and Social Mobility in Postwar Japan: Trends and Some Institutional Aspects*. “International Journal of Japanese Sociology”, 9 (1), 2009, pp. 3–19. Available at: DOI:10.1111/j.1475-6781.2000.tb00073.x (access: 20.07.2023).

345 See: *Social mobility in Hong Kong*, Research Brief, 2, 2014–2015. Available at: <https://www.legco.gov.hk/research-publications/english/1415rb02-social-mobility-in-hong-kong-20150112-e.pdf> (access: 25.07.2023).

346 S. Lee, *A Social Ladder or a Glass Floor? The Role of Higher Education in Intergenerational Social Mobility: Empirical Evidence from South Korea*. “High Educ Policy”, 35, 2022, pp. 969–998. Available at: <https://doi.org/10.1057/s41307-021-00241-1> (access: 24.07.2023).

China's<sup>347</sup> model of social mobility, deeply rooted in Confucian educational culture, combined with traditional Confucian cultural mindsets and contemporary lifestyles driven by the neoliberal capitalist economy, together, they put tremendous pressure on families to motivate students to excel academically. The second aspect presented in this chapter, crucial to understand the nowadays shadow education reform in China, is the system of household registration 户籍 *hùjí* known more widely as 户口 *hùkǒu* introduced in the 50th of XX century. With intensive inner migration policy processes resulting from economic reform and open-door policy in late 1978, *hùkǒu* has become one of the most significant institutional barriers to educational equality in modern China. Finally, the goals of Chinese shadow education reform, known as the Double Reduction Policy (双减政策 *shuāng jiǎn zhèng cè*), will be presented and discussed.

## Shadow education

The term shadow education appeared in the Singaporean newspaper “Straits Times” in 1992 in an article by Cherian George, writing about parents funding private tutoring and extra classes for their children to enable them to achieve better results during exams<sup>348</sup>. In the same year, David Lee Stevenson, and David Baker<sup>349</sup> coined the term shadow education in their scholarly publication, where they describe it as “(...) set of educational activities that occur outside formal schooling and are designed to enhance the student’s formal school career”<sup>350</sup>.

Since then, the term shadow education has been adopted by other researchers and is commonly used in the scientific literature to describe additional forms of out-of-school education. Muhammad Abid Malik’s publication collects various authors’ definitions of “shadow education” that show a broad and narrow sense of this issue and compares these definitions to the explanations of the meaning of the term “shadow education” used by Stevenson and Baker: “A careful study by

347 D. S. G. Goodman, *Social Mobility in China: Class and Stratification in the Reform Era*. “Current History”, 117 (800), JSTOR, 2018, pp. 203–208. Available at: <https://www.jstor.org/stable/48614361> (access: 15.07.2023).

348 C. George, *Time to come out of the shadows*. “Straits Times”, April 4, 1992, p. 28. Available at: <https://eresources.nlb.gov.sg/newspapers/digitised/issue/straitstimes19920404-1> (access: 10.07.2023); see also: M. A. Malik, *Shadow Education: Evolution, Flaws, and Further Development of the Term*. “Social Sciences and Education Research Review”, 4 (1), 2017, pp. 6–29. Available at: <https://sserr.ro/wp-content/uploads/2017/08/4-1-6-29.pdf> (access 20.07.2023).

349 D. L. Stevenson, D. P. Baker, *Shadow Education and Allocation in Formal Schooling: Transition to University in Japan*. “American Journal of Sociology”, The University of Chicago Press, 97 (6), 1992, pp. 1639–1657.

350 *Ibidem*, p. 1639.

Stevenson and Baker (1992) reveals that they did not use the metaphor [shadow education] in the same sense. Instead, they said that the timings, types, forms, and use of shadow education were influenced and shaped by ‘allocation rules’<sup>351</sup>.

Continuing, Malik says that this way, they wanted the term “(...) denotes a strong connection between allocation rules and nonformal schooling”. He says, “It is clear that they were talking about school entrance exams and or procedures that influence the shadow education system upon the actual school process, curriculum, and structure”<sup>352</sup>. The above considerations indicate that shadow education creates structured teaching-learning processes and supervises learning outside the leading educational system. Due to its consequences, the social mobility model based on selective educational system exams brings family expectations for students’ scientific achievements, and this phenomenon interests people who shape modern countries’ educational policies<sup>353</sup>. As David Baker et al. put it: “Researchers studying the dynamic relationship between school and family influences on achievement has come to refer to the host of structured outside school achievement activities as shadow education”<sup>354</sup>.

Mark Bray, who for years researches shadow education, notes that the metaphor of the shadow used to describe the phenomenon of extracurricular activities has its justification here because, without mainstream education, there is no additional tutoring. The changes in the mainstream education system change the size and shape of supplementary tutoring<sup>355</sup>. In almost all societies, public opinion focuses primarily on the functioning of the mainstream educational system. Meanwhile, the features of shadow education are significant and could be more transparent and more noticeable<sup>356</sup>. Shadow education is both various forms of activity referred to as additional education<sup>357</sup>, out-of-school educa-

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351 I quote for: M. A Malik, op. cit., pp. 6–29.

352 Ibidem.

353 D. P. Baker, M. Akiba, G. K. LeTendre, A. W. Wiseman, *Worldwide Shadow Education: Outside-School Learning, Institutional Quality of Schooling, and Cross-National Mathematics Achievement*. “Educational Evaluation and Policy Analysis”, 23 (1), 2001, p. 1.

354 Ibidem.

355 M. Bray, *The shadow education system: private tutoring and its implications for planners*, UNESCO International Institute for Educational Planning (IIEP), Paris 2007. Available at: <https://unesdoc.unesco.org/ark:/48223/pf0000118486>, p. 20 (access: 01.07.2023).

356 Idem, *The shadow education system: private tutoring and its implications for planners. Fundamentals of Educational Planning*, UNESCO International Institute for Educational Planning (IIEP), Paris, France, 1999, Introduction, p. 61.

357 J. Lu, P. Tuo, J. Pan, M. Zhou, M. Zhang, S. Hu, *Shadow Education in China, and Its Diversified Normative Governance Mechanism: Double Reduction Policy and Internet Public Opinion*. “Sustainability”, 15 (2), 2023, p. 1437. Available at: <https://doi.org/10.3390/s15021437> (access: 12.07.2023).

tion<sup>358</sup>, supplementary tutoring, or additional private lessons, where the goals are to help students “catch up with school” as well as – and more and more often – systematized implementation of topics outside the teaching that take place in mainstream schools. The purpose of such activities is thus shifted from *ad hoc* assistance provided to the student – in understanding the issues implemented as part of a school subject or from following the developing cognitive passions of children and youth – to preparing students to obtain the best possible results during challenging, competitive, selective exams given in the mainstream education<sup>359</sup>. Institutions offering such educational tutoring services are becoming a profitable global business venture. The widespread presence of shadow education in modern societies means that its role and importance in the global sense are increasing and can be observed in documented achievements in international educational measurements.

In this context, it should be noted that in writing about shadow education M. Bray and others use the term “structured” as one of the characteristics of those shadow education activities. At this point, we can refer to the detailed standard definition of shadow education, developed by Bray<sup>360</sup>, that helped me later describe this sector of educational services in China and its recent reform introduced there in 2021. Mark Bray distinguishes the following dimensions of

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- 358 W. Zhang, M. Bray, *Comparative research on shadow education: Achievements, challenges, and the agenda ahead*. “European Journal of Education”, 55, 2020, pp. 322–341. Available at: <https://doi.org/10.1111/ejed.12413> (access: 14.07.2023).
- 359 See: C. Buchmann, D.J. Condrón, V. J. Roscigno, *Shadow education: theory, analysis, and future directions – A rejoinder*. “Social Forces”, 89 (2), 2010, pp. 483–490. Available at: <https://doi.org/10.1353/sof.2010.0105> (access: 11.07.2023); D. P. Baker, *The schooled society: the educational transformation of global culture*, Stanford University Press, Stanford 2014.
- 360 M. Bray, *Adverse effects of private supplementary tutoring: Dimensions, implications, and government responses*, Series: *Ethics and Corruption in Education*, UNESCO International Institute for Educational Planning (IIEP), Paris 2003; Idem, *Confronting the shadow education system: What government policies for what private tutoring?* UNESCO International Institute for Educational Planning (IIEP), Paris 2009; Idem, *The challenge of shadow education: Private tutoring and its implications for policymakers in the European Union*, European Commission, Brussels 2011; Idem, *Shadow education in Europe: Growing prevalence, underlying forces, and policy implications*. “ECNU Review of Education”, 4, 2020, East China Normal University. Available at: <https://doi.org/10.1177/2096531119890142> (access: 11.07.2023); Idem, M. N. Kobakhidze, L. E. Suter, *The challenges of measuring outside-school-time educational activities: Experiences and lessons from the Program for International Student Assessment (PISA)*. “Comparative Education Review”, 64 (1), 2020, pp. 87–106. Available at: <https://doi.org/10.1086/706776> (access: 01.06.2023); M. Bray, M., O. Kwo, *Regulating private tutoring for public good: Policy options for supplementary education in Asia*. Hong Kong, China: Comparative Education Research Centre, The University of Hong Kong and Bangkok, Thailand: UNESCO, 2014; M. Bray, C. Lykins, *Shadow education: Private tutoring and its implications for policymakers in Asia*. Mandaluyong City, Philippines: Asian Development Bank and Hong Kong, China: Comparative Education Research Centre, The University of Hong Kong, 2012.

educational activities falling within the scope of the concept of shadow education:

1. Supplementary dimension, because shadow education concerns subjects already taught at school,
2. The payment dimension, always associated with private tutoring undertaking, is paid, unlike free tutoring provided by families or community members or additional tutoring provided by schoolteachers as part of their professional obligations and duties. It is the dimension of education in which we deal primarily with tutoring provided by private entrepreneurs and private individuals for profit,
3. The academic dimension of provided tutoring includes languages, math, and other exam subjects. In contrast, it does not include music, arts, or sports skills, mainly learned for fun, for a more comprehensive form of personal development<sup>361</sup>.

Like other researchers<sup>362</sup>, M. Bray draws attention to various forms of private tutoring. Some tutoring is conducted individually in the tutor's or client's home. Others are held in small groups, large classrooms, and even colossal lecture halls with video screens. Some tutoring is provided only by mail or via the Internet, and sometimes tutoring is provided over the phone. As Bray notes, because private tutoring can be provided in so many forms, the contrasts created by this diversity allow for interesting comparative study research<sup>363</sup>.

On the other hand, Soo-Yong Byun and David P. Baker point to the paradox that despite the growing number of studies, it is still not clear what role (and whether at all) shadow education plays concerning mainstream education and whether/ what significance it has in achieving educational results<sup>364</sup>. The global expansion of shadow education is an important topic, e.g., in the sociology of education and policy of education, as S.-Y. Byun, D. P. Baker, and Lee Jin

361 M. Bray, *The shadow education system: Private tutoring and its implications for planners. Fundamentals of Educational Planning*, UNESCO International Institute for Educational Planning (IIEP), Paris 1999, p. 21.

362 See: E. Grodsky, *Learning in the shadows and in the light of day: A commentary on Shadow education, education, American style: Test preparation, the SAT and college enrollment. "Social Forces"*, 89 (2), 2010, pp. 475–481. Available at: <https://doi.org/10.1353/sof.2010.0063> (access: 06.05.2023); P. K. Suante, M. Bray, *Researching Forms of Shadow Education: Methodological Challenges and Complexities of Private Supplementary Tutoring in Myanmar. "ECNU Review of Education"*, Online First, April 19, 2023. Available at: <https://doi.org/10.1177/20965311231167194> (access: 16.07.2023).

363 M. Bray, *The shadow education system: Private tutoring and its implications for planners...*, pp. 21–22; S. Byun, D. Baker, *Shadow education*, [in:] *Emerging trends in the social and behavioral sciences: An interdisciplinary, searchable, and linkable resource*, (eds.) R. Scott, S. Kosslyn, N. Pinkerton, Wiley-Blackwell, Hoboken, New Jersey 2015, pp. 1–9.

364 S. Byun, D. Baker, op. cit., p. 2.

Chung<sup>365</sup> note. According to Buyn, Baker, and Chung, some educators believe that shadow education is a phenomenon that spoils the quality of the educational process that takes place in schools, if only because students participating in the form of extracurricular teaching tend to pay less attention to what is happening in the classroom. On the other hand, regarding the inequality of educational opportunities, shadow education is a type of service purchased privately. However, it covers subjects taught in mainstream education. Thus, it is a potential educational advantage obtained from private funds of families who can afford it to those who cannot<sup>366</sup>.

Mark Bray and Chad Lykins<sup>367</sup>, analyzing shadow teaching in Asian countries, point to the scale and systemic nature of private tutoring organized there, justified by Confucian traditions and values, an essential cultural component of Asian social systems. Confucianism was crucial in shaping social tradition in China and state administration<sup>368</sup>. As Bray and Lykins write, China had a long period of private tutoring in its educational history before the modern universal education system emerged there. Being the paradigm of social principles in Chinese society<sup>369</sup>, Confucianism has always valued educational achievement and viewed educational qualifications as the main path of social mobility for personal and family advancement. This trajectory was interrupted by the approach of the communist government of the People's Republic of China, which constructed its ideology as official opposition to Confucian traditions in the times of Mao Zedong. For several decades, the Confucian heritage did not lead to the emergence of a private tutoring system. Among other features of the narrative of communist ideology in China, private enterprise was strictly prohibited and the communist ideology that oversaw the Confucian heritage prevented the emergence of an institutionalized private tutoring system. However, circumstances changed after Mao Zedong's death with the emergence of a market economy supported by rising incomes and encouraging labor mobility in China. All these changes began to foster competition in education, and competitiveness in the education system became the driving force behind the social stratification and

365 S-Y. Buyn, H. J. Chung, D. P. Baker, *Global Patterns of the Use of Shadow Education: Student, Family, and National Influences*, "Research in the Sociology of Education" 20, Emerald Group Publishing Ltd., 2018, pp. 75–105.

366 Ibidem.

367 M. Bray, C. Lykins, op. cit., Preface vi.

368 See: Y. Yan, *The Chinese path to individualization*. "The British Journal of Sociology", 61 (3), 2010, pp. 489–512.

369 A. Gromkowska-Melosik, A. Boroń, *Chinese women in society: Confucian past, ambiguous emancipation, and access to higher education*. "International Journal of Chinese Education", 12 (2), 2023, pp. 1–16, see also: A. F. Kola, *Rorty – Konfucjusz: merytokracja w poszukiwaniu humanizmu i uniwersalnej ramy odniesienia*. "Przegląd Filozoficzny – Nowa Seria R", 3 (79), 2011. Available at: <https://doi.org/10.1177/2212585X231181703> (access: 21.07.2023), p. 2.

social mobility of modern Chinese society, and private tutoring flourished in the 1980s<sup>370</sup>.

Over time, in the 21st century, the scale of institutionalized private tutoring has caught up with and surpassed that of countries where tutoring through the private tutoring sector has been developing for centuries. As a result, modern China, which, as mentioned earlier, is part of a world where the values of the Confucian tradition are very strongly present in the ways of thinking about education and the educational success of the individual. Education leads both to the internal development of the individual and to obtaining the appropriate social status. This way of thinking about education aligns with the orientation of the meritocratic approach. The article by Zbyszko Melosik<sup>371</sup>, presents and analyzes the theories of meritocracy and credentialism from the perspective of the sociology of education. The author discusses the relationship between education and social stratification, paying particular attention to the opposition of interpretation of the dilemma of equality and inequality in education. Applying this category of analysis to the situation of China's shadow education gives it an additional exciting dimension.

On the one hand, since the late 1980s, the neoliberal values and policy of the Chinese state shaped by the Chinese Communist Party have allowed for the expansion of private education, contributing to China's educational and socio-economic development. On the other hand, its adverse effects are visible, including sky-rocketing emotions about expectations for educational achievements and growing prices for tutoring. Expectations and desires, accompanied by fears and anxieties of parents who feel responsible for the future of their children and families exposed to fierce competition, put enormous pressure on primary and secondary school (K-12)<sup>372</sup> students to mobilize them for increased educational effort. Together, these two elements have contributed to parents taking (voluntarily or under social pressure) responsibility for their children's educational success and playing a pivotal role in fierce competition, thus contributing to the growing importance of the private sector in education and deepening educational inequalities. For many years, China lagged far behind its neighbors, such as South Korea and Japan, in regulating the tutoring market until 2021, when reform in the private education sector emerged. This reform made today's China a country with detailed and comprehensive regulation of the tutoring market. The reform introduced in 2021 is crucial, considering the correlations and connections between the changes that have taken place over the last

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370 M. Bray, C. Lykins, op. cit., p. 8.

371 Z. Melosik, *Edukacja uniwersytecka i procesy stratyfikacji społecznej*. "Kultura – Społeczeństwo – Edukacja", 1 (3), Poznań 2013, pp. 21–46.

372 See: *Education in China. A Snapshot*, OECD, 2016, p. 10. Available at: <https://www.oecd.org/china/Education-in-China-a-snapshot.pdf> (access: 29.07. 2023).

ten years at the initiative of the Chinese Communist Party and the central government in Beijing in the social and educational areas, including changes introduced both in education policy and in household registration. For this reason, before discussing the Chinese reform of shadow education, known as the Double Reduction Policy (双减政策 *shuāng jiǎn zhèng cè*), a broader reference to the issues enabling its socio-political contextualization seems necessary.

## Competitiveness in the Chinese education system

As mentioned earlier in this chapter, East Asian societies are highly competitive and hierarchical. Nowadays, competitiveness in Asiatic education is a combination of the legacy of Confucianism – respect for teachers, scholars, and the centuries-old tradition of meritocratic examinations and neoliberal ideology. At this point, it is worth mentioning the publication of Barry O’Sullivan and Liying Cheng<sup>373</sup>. Their research relates to the phenomenon of the first example of a standardized examination system – the Chinese Imperial Examination System (Kējǔ – Hanyu Pinyin 科举 in Chinese): “In dynastic China, the Kējǔ served as a mechanism to select the empire’s highest officials. The Kējǔ was the world’s first merit-based examination system (Hu, 1984; Lai, 1970), the origins of which can be traced back nearly 2000 years to the Han dynasty (206 BCE to 220 CE)”<sup>374</sup>. According to Confucianism’s assumption that people are naturally similar, the effectiveness in learning distinguishes people from each other. Civilized behavior based on a foundation of kindness and decency was the core value of Confucian teaching, and the ultimate goal of Confucian education was human perfection in the ethical sense. The reward for achieving such a level of individual development was the appropriate social status and the accompanying social respect<sup>375</sup>. During the hundreds of years of feudalism based on Confucianism, an individual could change his social status and, with it, the fate of his family by participating in selective imperial examinations:

“The essential function of the system was to identify those exceptionally talented male citizens who had mastered what was considered at the time to be the knowledge and skills to ensure the continuation of the empire. The most successful of these became the Mandarin (senior civil servants)”<sup>376</sup>.

373 B. O’Sullivan, L. Cheng, *Lessons from the Chinese imperial examination system*. “Language Testing in Asia”, 12 (52), 2022. Available at: [https://doi.org/10.1007/978-981-13-8347-2\\_6](https://doi.org/10.1007/978-981-13-8347-2_6) (access: 14.05.2023).

374 B. O’Sullivan, L. Cheng, *op. cit.*, p. 3.

375 *Ibidem*, p. 1–2.

376 *Ibidem*, p. 3.

Over time, under the influence of Western models, these traditional civil exams based on memory were replaced by a new education system, when the way of perceiving and organizing education in China resulted from social and ideological changes influenced by the West. The Hundred Days' Reform (or Wuxu Reform: 戊戌变法; pinyin: Wùxū Biànfǎ), introduced in 1898, became a turning point for modern Chinese education. Its result was introducing China's first modern structured education system<sup>377</sup>. Another crucial moment came in 1949 when education, recognized as a central issue, became a state influence area. As a result, public schools replaced elite private schools. Later, during the Cultural Revolution, schools functioned as institutions focused more on ideology than on the school curriculum, and only after the end of the Cultural Revolution did schools begin to reopen for teaching-learning purposes. Examinations returned to secondary schools, and a new curriculum allowed students to take exams to improve their academic level. Educational values slowly started to recover in China, and soon parents began to pay attention to their children's best academic results again. Examinations, like in the past, began to play an essential role in the transition to higher levels of education and professional career. This focus on exam results and their selective function, coupled with the influence of cultural traditions and neoliberal approaches, drove the development of shadow education<sup>378</sup>.

Nowadays, educational and social inequalities in China result from the economic transformation of the late 70. and 80. of the XX century. From this moment, there was growing inequality between individuals (rich and poor) and differences between the country's regions according to educational possibilities. From the 90. of the XX century until today, researchers notice an emphasis on family responsibilities for education and upholding elitism together with neoliberal changes in China. A series of reforms in various fields were introduced there at the turn of the 21st century, including education reforms that brought private-sector of extracurricular activities and established optional, private pre-school education<sup>379</sup>. As Byun and Baker write, "We are only now beginning to understand shadow education as an important dimension of parental involvement and as a modern school process"<sup>380</sup>.

377 L. J. Harris, *The Hundred Days' Reforms, 1898*, [in:] *The Peking Gazette. A Reader in Nineteenth-Century Chinese History*, (ed.) L. J. Harris, Brill, 2018, pp. 280–298.

378 R. Pyffel, *Edukacja w Chinach, czyli wielki szacunek dla wiedzy i nauki*. "Postaw na edukację". Available at: <https://blog.gwo.pl/edukacja-w-chinach/> (access: 08.12.2021).

379 G. Fan, *Changes in Educational Institutions in China: 1978–2020*, [in:] *Handbook of Education Policy Studies*, (eds.) G. Fan, T. S. Popkewitz, Springer, Singapore 2020. Available at: [https://doi.org/10.1007/978-981-13-8347-2\\_6](https://doi.org/10.1007/978-981-13-8347-2_6) (access: 23.06.2023).

380 S. Byun, D. Baker, op. cit.

Public kindergartens in China do not provide education to implement the curriculum. Hence many parents choose private kindergartens where children can be prepared for school and implement the curriculum so that after starting school, they occupy a high position in the class regarding achieved results. It is especially true for learning Chinese phonics, pinyin, and writing characters. Having mastered the basics of reading and writing, students go far beyond the level of those who have yet to learn these skills at school. Parents perceive all the ways that give students an advantage over classmates as essential and play a massive role in a constantly competitive environment<sup>381</sup>. Most children started to attend additional classes from age six, while being parallel in compulsory schooling to age fifteen in secondary school stage I (3 years), to be prepared by private tutoring institutions for taking part in 中考 *zhōngkǎo* entrance examination for high school. This first crucial selection point in the Chinese education system plays an essential role in secondary school's next stage (stage II). As a result of *zhōngkǎo*, around 60% go to academic high schools and 40% to vocational schools<sup>382</sup>. For years only academic high school ends with *gāokǎo*<sup>383</sup>, the selective exam determining the assignment to a higher education institution (university level). Because of this assignment, the ranking of secondary schools where students get prepared for *gāokǎo* is making an extreme competition to get there. It brings a very high workload for students while preparing for the final exam. It also contributed to a negative stereotype of vocational schools. All parents want their kids to attend an excellent high school or a good college, so they want them to compete. Most parents expect high scores from their children when the state and its educational system continue to select talent through the *zhōngkǎo* and *gāokǎo* significant exams. They send them for courses to stay on track with the curriculum and keep up with their tutoring peers<sup>384</sup>. So, if parents can afford tutoring, they will do it because academic education allows an individual to participate in social mobility. Behind this is the fear of both parents and students that if the student fails exams like *zhōngkǎo* and *gāokǎo*, one will face competition in the labor market in a country that has adopted the 9-9-6 work culture, which means working from 9 am to 9 pm (i. e., 12 hours a day) for six days

381 See: A. Mańkowska, *Edukacja w Chinach. Studium systemu edukacji i jego społeczno-kulturowych uwarunkowań*, Wydawnictwo Naukowe UAM, Poznań 2021.

382 See: H. Ross, Y. Cen, Z. Zhou, *Assessing student engagement in China: Responding to local and global discourse on raising educational quality*. "Current Issues in Comparative Education", 14 (1), 2011, pp. 24–37.

383 See: A. Gromkowska-Melosik, *Gaokao I procesy stratyfikacji społecznej w Chinach*, "Studia Edukacyjne", (44), Poznań 2017, pp. 45–63. Available at: DOI: 10.14746/se.2017.44.3 (access: 10.02.2021).

384 W. Zhang, *The demand for shadow education in China: Mainstream teachers and power relations*. "Asia Pacific Journal of Education", 34 (4), 2014, pp. 436–454. Available at: <https://doi.org/10.1080/02188791.2014.960798> (access: 10.06.2023).

a week. But, for many children from low-income families, gāokǎo, with all of its problems, is still, *de facto*, the only way to access high-quality education and the only chance for a decent job and life. Suppose gāokǎo is eradicated or replaced by a new system. In that case, the likely outcome will be that only children from resourceful families will be allowed to attend prestigious universities, and gaps dividing society into rich and poor groups will grow.

As mentioned, Chinese parents prefer their children to attend academic schools. They do not want vocational education, which they perceive as not providing a chance for social advancement, and thus useless or even closing the road to success. Therefore, parents spend about 70% of their income on private tutoring to make their children more competitive<sup>385</sup>. The Vocational Education Law introduced by the Ministry of Education promotes vocational education in China and fights against the stereotype of vocational education perceived as inferior to academics. It indicates the government's interest in vocational education at the secondary and higher levels and investments in polytechnic education, showing the relationship between vocational education and technology development in China. In the case of secondary vocational schools, students have the opportunity to participate in gāokǎo, which was not the case in the past. The goal is to raise their social status by obtaining vocational education and getting jobs as professionally educated persons in companies that need highly qualified professional employees, as well as equal opportunities with graduates of academic schools taking the final gāokǎo exam. Therefore the government recognizes as a necessity to improve, promote, and raise the level of technical and vocational schools. The other argument is that not all students desire, and some do not have the opportunity, to attend regular universities. China intends to raise the standard and prestige of its professional, technical, and vocational education institutions by associating them with large companies. As the Ministry of Education puts it, those who would like to have their own business could also do it because they have the appropriate education and expertise from these professional institutions<sup>386</sup>.

Reforms of vocational education in China, based on Germany's example, aim to produce advanced technologies and keep the services sector at the same level as production. However, to make technical vocational courses popular among the Chinese, the stereotypes of vocational education should be broken. For now, when at the age of 15, students are assigned to academic or vocational schools, those who go to the vocational education are perceived as missing the only chance

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385 See: D. Zhang, *The situation of Chinese students in Germany: an intercultural perspective and study*, Herbert Utz Verlag, München GmbH, 2015, p. 41.

386 See: *Vocational Education Law of the People's Republic of China*, Ministry of Education The People's Republic of China, July 23, 2009. Available at: [http://en.moe.gov.cn/documents/laws\\_policies/201506/t20150626\\_191390.html](http://en.moe.gov.cn/documents/laws_policies/201506/t20150626_191390.html) (access: 22.07.2023).

for a better life. Those who attend vocational schools are stigmatized as they cannot get into standard good academic high schools. When universities start to accept and support those who have worked for some time and want to return to education, it can help break the stereotype of vocational education as limiting the development of an individual<sup>387</sup>.

For now, parents are focusing on their children's success in the academic type of education. This intense parenting reflects the competitive nature of the educational process and parents' deep-seated anxiety about their children's education. Private tutors are one of the beneficiaries of this concern, turning the "tiger"<sup>388</sup> parents' ambitions into a steady income stream<sup>389</sup>. In this context, the development of vocational education is also a work to do with parents' (or society) awareness about changing of vision what is a success in education and what it is a success in their children's life.

## Internal migrations and the household registration system in China

Deng Xiaoping's reforms in the 80th of the XX century allowed China to build an economically strong state and society with a growing middle class, enabling millions of Chinese to migrate internally in search of work. This part of the chapter attempts to answer the question of what hùkǒu is and its role in the educational system in the context of internal Chinese migrations. The phenomena of social control, as a registration of the place of one's residence, in Asia have different origins. For example – it was koseki (戸籍) in Japan, hoju in Korea (Korean: 호주; Hanja: 戶主), or hộ khẩu (戶口) is a family register and residence registration system in Vietnam. Writing about China's long tradition of social registration, the 保甲 bǎojiǎ system is worth mentioning here. Bǎojiǎ was the traditional Chinese system of collective neighborhood organization by which Imperial China maintained its order and control at all levels of society. Mo Tian<sup>390</sup>

387 Y., Ling, S. J. Chung, L. Wang, *Research on the reform of management system of higher vocational education in China based on personality standard*. "Current Psychology", 42, 2023, pp. 1225–1237. Available at: <https://doi.org/10.1007/s12144-021-01480-6> (access: 21.08.2023).

388 See: W. Zhang, *Shadow education in the service of tiger parenting: Strategies used by middle-class families in China*. "European Journal of Education", 1 (17), 2020. Available at: DOI: 10.1111/ejed.12414 (access: 14.05.2023).

389 Y. Hou, *One Year Later: Behind China's Education Reforms*. "Asia Global", August 11, 2022. Available at: <https://www.asiaglobalonline.hku.hk/one-year-later-behind-chinas-education-reforms> (access: 21.07.2023).

390 M. Tian, *The Baojia System as Institutional Control in Manchukuo under Japanese Rule (1932–45)*. "Journal of the Economic and Social History of the Orient", 59 (4), 2016, pp. 531–554. Available at: <https://doi.org/10.1163/15685209-12341407> (access: 11.07.2023).

says that the *bǎojiǎ* system was a Chinese mechanism of social control in rural areas. When the communist government seized power in 1949, the social control system practiced throughout China until this moment was abolished<sup>391</sup>. So the answer to what *hùkǒu* is brings a story about China in the 1950s. According to Ming Lu and Guanghua Wan, the central government introduced 户籍 *hùjī* household registration system, more widely known as 户口 *hùkǒu* system in Chinese cities in 1951 aimed at maintaining social order, protecting the rights of Chinese citizens, serving the establishment of socialism, constituting a modern way of registering the population and, as Joanna Wardęga writes about it: “Undoubtedly, the restrictive hukou registration system for several decades has played a huge role in shaping the stratification of contemporary Chinese society”<sup>392</sup>. In 1958, as Cindy Fan puts it, the central government redesigned the system and extended it to the countryside in 1958<sup>393</sup>, to limit the geographic mobility of Chinese citizens<sup>394</sup>. The term 户口 *hùkǒu* means exactly the document confirming the registration, which is in the form of a red booklet. In China, it is called an internal passport, which contains information confirming the individual’s affiliation to the place of residence in the administrative and social sense. Since the 1990s, the registration system has been in its electronic form, allowing authorities to track changes in an individual’s life. The *hùkǒu* system divides the population into rural and urban classes, where citizens can use public services. At first, few people in mainland China questioned the importance of the system and how it affected their lives or determined their destinies. On a macro level, the centrality of this system has led some to argue that the industrialization strategy and the *hùkǒu* system were essential organic parts of the Maoist model: they would not be able to implement this strategy without that system.

Nevertheless, many scholars in the West, notably D. Wang and F. Christiansen<sup>395</sup>, K. W. Chan<sup>396</sup>, T. Cheng and M. Selden<sup>397</sup>, began to study this critical

391 “*Baojia*” explanation of the term. This article was most recently revised and updated by Kathleen Kuiper. Available at: <https://www.britannica.com/topic/baojia> (access: 10.06.2023).

392 J. Wardęga, *Nierównomierna modernizacja a przeobrażenia struktury społecznej w Chińskiej Republice Ludowej*. “*Krakowskie Studia Międzynarodowe*”, 12 (3), 2015, p. 59.

393 L. Ming, W. Guanghua, *Urbanization and Urban Systems in the People’s Republic of China: Research Findings and Policy Recommendations*. “China’s Economy: A Collection of Surveys (Special Issue)”, 28 (4), (eds.) I. Claus, L. Oxley, 2014, pp. 671–685.

394 C. C. Fan, *Migration, hukou, and the city*, [in:] *China Urbanizes. Consequences, Strategies, and Policies* (eds.) Y. Shahid, T. Saich, World Bank, Washington DC 2008.

395 D. Wang, F. Christiansen, *The pursuit of new citizenship by peri-urban residents in China: Status, rights, and individual choice*. “China Information”, 34 (2), 2020, pp. 250–269.

396 K. W. Chan, *The Chinese Hukou System at 50*. “*Eurasian Geography and Economics*”, 50 (2), 2009, pp. 197–221. Available at: DOI: 10.2747/1539-7216.50.2.197 (access: 04.05.2023); K. W. Chan, W. Buckingham, *Is China Abolishing the Hukou System?* “*China Quarterly*”, 195 (195), 2008, pp. 582–606. Available at: 10.1017/S0305741008000787 (access: 23.06.2023).

topic concerning population mobility and its social and economic consequences. Unlike the population registration systems of many other countries, the Chinese system was designed as one of the main tools of social control to provide population statistics and determine the personal status of citizens by directly regulating the geographic distribution of the population. Its functions go far beyond simply controlling the mobility of the population<sup>398</sup>. As Jaramillo writes for Chinese nationals, hùkǒu status defines a wide range of benefits and social services, “where they can get health care, what type of pension they are entitled to, whether they can get loans, what public schools their children can attend and more”<sup>399</sup>. Boquen says that the current version of the hùkǒu has three main functions: controlling internal migration, managing social protection, and preserving social stability. The hùkǒu system also allows authorities to treat individuals differently based on classification, emphasizing promoting social stability. However, the system of social control of mobility should not be confused with the Social Credit System<sup>400</sup>. As Maciej Walkowski writes, Social Credit System (社会信用体系, shèhuì xìnyòng tǐxì) is a nationwide political program consisting of several pilot projects aimed at establishing a social evaluation system that will create profiles of citizens and enterprises in the People’s Republic of China based on data collected over decades and stored both in analog and state-of-the-art technologies. The system focuses on four primary areas – state-owned enterprises and the economy, society, judiciary, and public administration, thus building a higher level of trust and social security, ensuring better compliance with the law, eliminating corruption, and ensuring adequate transparency. So far, there is no unified social evaluation system<sup>401</sup>.

Deng Xiaoping’s reforms in the 80th of the XX century allowed China to build an economically strong state and society with a growing middle class, enabling millions of Chinese to migrate internally in search of work. During this reform period after Mao’s death, inner migrants became the driving force behind fundamental changes and reconstruction of the Chinese economy. In the 1990s,

397 T. Cheng, M. Selden, *The Origin and Social Consequences of China’s Hukou System*. “The China Quarterly”, 139, 1994, pp. 644–668.

398 X. Wu, D. J. Treiman, *The Household Registration System and Social Stratification in China: 1955–1996*. “Demography”, 2 (41), 2004, pp. 363–84. Available at: JSTOR, <http://www.jstor.org/stable/1515171> (access: 10.07.2023).

399 E. Jaramillo, *China’s Hukou Reform in 2022: Do They Mean it this time?* April 20, 2022. Available at: <https://www.csis.org/blogs/new-perspectives-asia/chinas-hukou-reform-2022-do-they-mean-it-time> (access: 14.07.2023).

400 A. Boquen, *China’s Hukou System Explained*. Available at: <https://nhglobalpartners.com/the-chinesehukou-system-explained>, quoted for M. Walkowski, *Social Credit System in the People’s Republic of China. Theoretical Assumption and Implementation*. “Polish Political Science Yearbook”, 51 (19), 2022, p. 140. Available at: <https://doi.org/10.15804/ppsy202239> (access: 15.06.2023).

401 M. Walkowski, *op. cit.*, pp. 135–153.

Chinese citizens with rural *hùkǒu* obtained permission from the state to move to Special Economic Zones that were then created in the People's Republic of China<sup>402</sup>. However, Deng's reforms left the distinction between urban and non-urban households in the *hùkǒu* system. Thus, along with the search for better working conditions and dreams of changing their living situation, millions of Chinese internal migrants crossing the borders of their provinces ended up in large cities, where, according to the status of *hùkǒu*, they had no rights to use public benefits. In retrospect, it is clear that they became a group that was often brutally exploited economically, which was due to both their education level, most often limited to compulsory school, the desire to earn money to improve the living conditions of their families, and also naivety in assessing their place and position during the transformation period. The vast fortunes of native and foreign investors were made possible by exploiting inner migrants with rural *hùkǒu*.

According to social registration system rules, those born with a social status inherited from their parents cannot change it. Consequently, their children (children of internal Chinese migrants) are mainly unable to attend public schools in large cities, and the family bears the high cost of educating them in private institutions if the parents decide that the child stays with them. Otherwise, they send the children to their parents in the province where, according to the inherited status of *hùkǒu*, where they can attend public school. In some cities, since 2006, it has been possible to enroll children of internal migrants in municipal schools, but only until the end of lower secondary school. However, the social situation of rural to urban migrants was even more complicated. At this point, the prejudice against the perception of the rural population as inferior is worth mentioning, what we may see in the Chinese discourse of *suzhi* (素质)<sup>403</sup>. This prejudice legitimizes the growing income, education, and social status disparities between urban and rural areas. Since the late 70th of the XX century, millions of rural-to-urban inner-Chinese migrants could not obtain urban registration status, and living without a permit in big cities, occasionally they were blamed for overpopulating urban settlements, rising crime, or other crime-related problems. As we may read in the article by Lifang Wang, "Since the 1980s, when China began to implement economic reforms, the Chinese state has constructed a discourse of quality to attribute China's underdevelopment to the low

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402 K. Czekałowski, *Hukou, czyli uciążliwe zameldowanie*. "Prawo chińskie", April 26, 2021. Available at: <https://prawochinskie.com.pl/hukou-czyli-uciazliwe-zameldowanie/> (access: 15.06.2023).

403 A. Kipnis, *Suzhi: A Keyword Approach*. "The China Quarterly", 186, 2006, pp. 295–313; see also: <https://www.thechinastory.org/yearbooks/yearbook-2013/introduction-engineering-chinese-civilisation/suzhi-%e7%b4%a0%e8%b4%a8/> (access: 20.07.2023).

quality of its population, which is supposed to hinder China's attempts to catch up with the more advanced Western economies<sup>404</sup>.

In 2014, Xi Jinping's urbanization campaign<sup>405</sup> started the transformation of rural social registration statuses for some 100 million internal Chinese migrants into urban hùkǒu, but this still leaves most rural-to-urban migrants stigmatized lower-status groups. Hùkǒu remains an institutional barrier limiting, among others, access to public education for children of internal migrants, referred to in the literature as "children left behind" and contributing to the deepening of socio-educational inequalities. In Jason Hung's<sup>406</sup> we find an analysis of the problems faced by Chinese citizens living in rural areas related to structural and institutional inequalities and social (im)mobility. J. Hung states, "(...) *parental disadvantage is a significant obstacle to gaining opportunities for social mobility among the next generations in rural Chinese contexts*"<sup>407</sup>. In his opinion, unfavorable conditions and circumstances of parental disadvantage are significant obstacles to gaining opportunities for social mobility among the next generations in rural Chinese contexts. Also, Nunzio Nazareno Donzuso<sup>408</sup>, writing about inner migrants workers in China, argues their importance for the growing Chinese economy and shows, at the same time, the role of the system of household registration: "China's *economic growth over the past 30 years has been possible partially due to the system of household registration known as hukou or huji. This system, distinguishing between two different types of citizens, i. e., between those with rural status and those with non-rural status, created what some scholars have called a de facto apartheid; a brand of dual-class citizenship. Since hukou status is actually quasi-permanent, a new category of urban workers has appeared in China in the last couple of decades*"<sup>409</sup>. According to N. N. Donzuso, hùkǒu works as follows: each Chinese citizen is assigned an urban or rural hùkǒu, depending on where they live. The goal was, after the communists took power, to create a

404 L. Wang, *Counter-Discourses and Alternative Knowledge: Rural Chinese Female Students Accommodating and Resisting the Discourse of Quality (Suzhi) at Higher Education Institutions in China*. "Journal of Inquiry & Action in Education", 7 (1), 2016, p. 18. Available at: <https://files.eric.ed.gov/fulltext/EJ1133601.pdf> (access: 01.08.2023).

405 See: M. G. Sarkar, *Xi Jinping and the Administrative Hierarchy and Subdivisions in China*. "Focus Asia Perspective & Analysis", August, 2020. Available at: <https://isdpeu/content/uploads/2020/08/Xi-Jinping-and-the-Administrative-Hierarchy-and-Subdivisions-in-China-FA-28.08.20.pdf> (access: 15.06.2023).

406 J. Hung, *Hukou System Influencing the Structural, Institutional Inequalities in China: The Multifaceted Disadvantages Rural Hukou Holders Face*. "Social Sciences", 11 (194), 2022, pp. 2–18. Available at: <https://doi.org/10.3390/socsci11050194> (access: 30.03.2023).

407 J. Hung, op. cit., p. 17.

408 N. N. Donzuso, *Equality of Opportunities' in Education for Migrant Children in China*. "Global Social Welfare", 2, 2015, p. 9–13. Available at: <https://doi.org/10.1007/s40609-014-0012-y> (access: 20.07.2023).

409 N. N. Donzuso, op. cit., p. 9.

system that would stimulate the country's planned economy. City dwellers were to support the development of local heavy industry, while rural dwellers were to produce agricultural goods<sup>410</sup>. According to Hung, on the other hand, the hùkǒu system is an element of the national social policy, under which the central government has delegated the right to local authorities at the city and village level to design their version of the hùkǒu rules. It means, for example, that non-local citizens coming to different towns or villages to live would have to follow the hùkǒu rules set by the local authorities to obtain basic welfare and social assistance or understand what the requirements for being able to change social status if it is required and allowed<sup>411</sup>.

As mentioned earlier, hùkǒu status is mainly the result of inheritance from parents. Prior to 1998, Chinese populations inherited their hùkǒu from their mothers. Since 1998, it has been possible to choose to inherit the type of status from the mother or father. People born in towns with both parents having rural status hùkǒu inherit rural status. As we can read in the article by Jessica L. Montgomery:

“Because hukou is primarily inherited from one's parents at the time of birth, children born in urban areas to parents with rural hukou are similarly designated as rural hukou holders. As a result, children living in cities with rural hukou are ineligible for enrollment in urban public schools even if they were born within the district”<sup>412</sup>.

From one's birth, every citizen is required to register with the hukou police office legally. This registration is known as personal identification<sup>413</sup>.

According to Giulia Raimondo<sup>414</sup> and Fei-Ling Wang<sup>415</sup>, hùkǒu registration includes a citizen's social status type, legal address, affiliation to the place of employment, and other personal and family data. The system legalizes households' access to social benefits – labor rights, health care, education, and more – at their place of residence, which means that rural hùkǒu holders are able, in most cases, to access most, if not all, state benefits and local social benefits intended for

410 Ibidem.

411 J. Hung, *Hukou System Influencing the Structural, Institutional Inequalities in China: The Multifaceted Disadvantages Rural Hukou Holders Face*. “Social Sciences”, 11 (194), 2022, p. 2. Available at: <https://doi.org/10.3390/socsci11050194> (access: 30.03.2023).

412 J. L. Montgomery, *The inheritance of inequality: hukou and related barriers to compulsory education for China's migrant children*. “Washington International Law Journal”, 21 (3), 2012, p. 591. Available at: <https://digitalcommons.law.uw.edu/wilj/vol21/iss3/7> (access: 14.07.2023).

413 J. Hung, op. cit., p. 2.

414 G. Raimondo, *The Chinese Hukou System: Reforming Institutions of Inequality Between the Need for Roots and the Demands of Change*. “Revue québécoise de droit international Quebec Journal of International Law”, 32 (1), 2019, pp. 139–171.

415 F.-L. Wang, *Organizing Through Division and Exclusion China's Hukou System*, Stanford University Press, 2005, p. 320.

China's rural population. In rural areas, one of the benefits is the allocation of land to peasants. The advantage of peasant work is that the nature of agricultural work involves a great deal of autonomy. Under the Household Responsibility Scheme (HRS), rural households must pay farm taxes and complete agricultural production quotas for the central government. It means that rural households can freely use any additional production on the farm for self-consumption, which involves selling them on the food market to earn a living or otherwise<sup>416</sup>. Hùkǒu status strongly indicates rights and privileges affecting individuals' socio-economic well-being. Having local hùkǒu status is necessary to qualify for unemployment and retirement benefits, medical care, enrollment in local schools, council housing, higher-skilled jobs, and more<sup>417</sup>.

China recognizes shifting its economy to higher-skill and technology-intensive economic activities and competing with other countries. There is a need for a well-educated workforce. Human capital is the primary determinant of getting out of the "middle-income trap". However, the main obstacle is the legacy of decades of discrimination against the rural population, contributing to a relatively poorly educated workforce. Although, in some places, impressive progress over the last decades indicates raising education levels in rural areas beyond the lower secondary level, it still needs to be improved for equal opportunities for rural and urban youth. Many schools in rural areas, primarily vocational final schools, tend to provide low-quality teaching and have a higher dropout rate<sup>418</sup>.

Changes in hùkǒu are taking place in smaller towns, but large cities still need to be more flexible in granting hùkǒu status. Discrimination against rural migrants and their children continues, especially in the largest cities. The dual system of hùkǒu, which lasted more than half a century and divided the population into rural and non-rural, was supposed to be abolished after 2014. Anyhow, the actual status of the hùkǒu is for life, even if the terms "rural hukou" and "non-rural hukou" are not allowed. However, only a few migrants (with non-local hùkǒu) in big cities can accumulate enough credits to transfer to local urban hùkǒu and provide the documents required to enroll their children in urban public schools. Hence, the 290 million non-local urban residents who face many

416 J. Hung, *Hukou System Influencing the Structural, Institutional Inequalities in China: The Multifaceted Disadvantages Rural Hukou Holders Face*. "Social Sciences", 11 (194), 2022, pp. 2–18. Available at: <https://doi.org/10.3390/socsci11050194> (access: 30.03.2023), p. 2.

417 Z. Zhang, D. J. Treiman, *Social origins, hukou conversion, and the well-being of urban residents in contemporary China*. "Social Science Research", 42 (1), 2013, pp. 71–89.

418 Y. Chen, *Problems with Rural Vocational Education in China and Countermeasures: Learning from the Experience of German Dual-System Vocational Education*. "Advances in Social Science, Education and Humanities Research", 496, 2020, p. 192. Available at: <https://www.atlantis-press.com/article/125949173.pdf> (access: 29.07.2023).

types of discrimination are still ubiquitous, at least in the larger cities. Even if hùkǒu – based discrimination were to be eliminated (not that far off yet), decades of prejudice against rural populations as having lower *suzhi* 素质 than urban populations would still take decades to overcome this historical-based stereotype.

China's incredible success in rapid economic growth over the first more than three decades of reform indicates that it can continue to be successful in Xi Jinping's pursuit of the "Chinese dream"<sup>419</sup>. However, a modern meritocratic society, with the complicated legacy of Mao's stratification system, tries to protect itself, and the state controls internal migration involving millions of citizens, helping China to avoid the economy's collapse<sup>420</sup>. As we read in the article by Karol Czekalowski, the number of people currently living in Chinese cities is over 900 million, five times the total number of urban citizens in 1980. Three out of five Chinese citizens live in cities, and an additional 15 million migrate to urban areas yearly. Migrations of such a gigantic extent had to be controlled by the state to avoid the collapse of the economy<sup>421</sup>. Xu Shaoshi, director of the State Development and Reform Commission, said that fourteen Chinese provinces had already introduced a uniform registration system for urban and rural residents. However, the latter still cannot enjoy equal access to public services such as health care and education for children. The economic magazine "Caixin" notes that local governments introduce their criteria for granting hùkǒu, such as having a stable income or housing, which only adds to the registration chaos<sup>422</sup>.

However, reforming the hùkǒu system and other government measures in this area will be crucial for improving the fate of millions of children and their families in China. In October 2015, the government introduced a new system called residence permits, which provide a legal guarantee of access to primarily free services like education, medical care, and others for people with permanent employment and a place of residence. For many families undergoing forced separation, the new permitting system may be the basis for improving their situation. In February 2016, the government also introduced, for the first time,

419 See: *The Chinese Dream Is a Dream of the People* – President Xi Jinping Shares Stories of Liangjiahe in Seattle. Available at: [https://www.fmprc.gov.cn/mfa\\_eng/topics\\_665678/zggcddwjw100ggs/xsd/202208/t20220826\\_10754300.html](https://www.fmprc.gov.cn/mfa_eng/topics_665678/zggcddwjw100ggs/xsd/202208/t20220826_10754300.html) (access: 16.07.2023).

420 A. Kaliński, *Chiny: obywatel ze wsi obywatelom I kategorii*. "ObserwatorFinansowy", 2014. Available at: <https://www.obserwatorfinansowy.pl/bez-kategorii/rotator/chiny-obywatel-ze-wsi-obywatelom-i-kategorii/> (access: 15.06.2023).

421 K. Czekalowski, *op. cit.*

422 M. Walkowski, *Social Credit System in the People's Republic of China. Theoretical Assumption and Implementation*. "Polish Political Science Yearbook", 51, 2022, pp. 135–153. Available at: <https://doi.org/10.15804/ppsy202239> (access: 11.07.2023).

official guidance on left-behind children<sup>423</sup>, outlining the responsibilities of parents, schools, and local authorities in childcare, as well as legal liability for non-compliance. It is a significant change in the government's attitude to the problem and probably a prelude to the reconstruction of the hùkǒu system, thus improving the situation of millions of left-behind children. Nevertheless, of course, the result of the reforms introduced will depend on the actions of local authorities<sup>424</sup>.

## Double Reduction Policy – reform of the shadow education sector in China

This part of the chapter attempts to present the researchers' arguments and discussion on the reason for and what will be the effects of the Double Reduction Policy introduced in 2021. Competition in educational systems is everywhere, but one cannot overcome it in Asia and, especially nowadays, China. The extreme level of competition and the involvement of parents and children it reached in China manifested as the advertisement of the institution offering private tutoring, which went viral on social media: "If you come, we will tutor and help your child. If you do not come, we will train and assist your competitor".

In 2020, official sources estimated that there were half a million tutoring companies in China, almost equivalent to the total number of schools<sup>425</sup>. Shadow education created a market estimated at 100 billion dollars until 2021 when the Chinese government issued: "Opinions on Further Reducing Student Homework and Off-Campus Compulsory Education Training Burden known as Double Reduction Policy (双減政策 *shuāng jiǎn zhèng cè*)"<sup>426</sup>. It has restricted the tutoring industry from making profits out of students of primary and secondary levels. Since the central government officially introduced this new approach

423 国务院关于加强农村留守儿童关爱保护工作的意见国发〔2016〕13号 [Guówùyuàn guānyú jiāqiáng nóngcūn liúshǒu értóng guān'ài bǎohù gōngzuò de yìjiànguófā (2016) 13 hào] – *Opinions of the State Council on Strengthening the Care and Protection of Left-behind Children in Rural Areas* (translation: A. Boroń), the original text (in Chinese) available at: <https://www.unicef.cn/sites/unicef.org.china/files/2018-09/state-council-guide-line-on-the-protection-of-left-behind-children.pdf> (access: 23.07.2023).

424 K. Kardaszewicz, *Chińska migracja i cena marzeń*. "Biuletyn Migracyjny", 56, Ośrodek Badań nad Migracjami UW, 2017.

425 J. Liu, M. Bray, *Responsibilised parents, and shadow education: managing the precarious environment in China*. "British Journal of Sociology of Education", 43 (6), 2022, pp. 878–897. Available at: <https://doi.org/10.1080/01425692.2022.2072810> (access: 19.07.2023).

426 J. Lu, P. Tuo, J. Pan, M. Zhou, M. Zhang, S. Hu, *Shadow Education in China, and Its Diversified Normative Governance Mechanism: Double Reduction Policy and Internet Public Opinion*. "Sustainability", 15 (2), 2023, p. 1437. Available at: <https://doi.org/10.3390/su15021437> (access: 12.07.2023).

towards the sector of shadow education, local authorities in several provinces, such as Shanxi and Hunan, ordered private companies to suspend online and offline tutoring classes for children from kindergarten to ninth grade a month later<sup>427</sup>. Although, this new law raised accusations that the goal of the Chinese government is the monopolization of education and attempts to collapse the technology sector or get rid of foreign capital from the Chinese market<sup>428</sup>.

We can recognize four perspectives that set up the goals of this new Chinese government policy. From psycho-pedagogical and sociological perspectives, the goals are to reduce the stress level of primary and secondary school students and families' anxiety combined with fear among parents that neglecting a child's education will be closing future chances for social mobility, professional career opportunities, and life happiness. The economic perspective brings goals to regulate the market of shadow education. From the point of view of the perspective of political narrative, Xue and Li's research shows three primary goals:

1. "Student-centered education" (the basic principle of schools),
2. "Quality-oriented education" (the guiding principle of schools) and
3. "Collaboratives home-school education" (the dominant direction of operating schools)<sup>429</sup>.

According to these new standards, education should put students first, solve their problems and protect their rights, which is considered a fundamental principle of the functioning of schools. The Chinese government argues that to reduce academic pressure on children, schools and instructors should put practical limits on the amount and length of student work. Schools can independently design and curate extracurricular content to meet students' diverse and personalized learning needs by shifting their roles from traditional policymakers to principal policymakers with specific policy initiatives. The other argument is that the new policy was needed due to the level of the tutoring industry that subordinated education to economic profit. It contradicted the understanding of education as a channel of social mobility in the sense of stratification processes and for overcoming class barriers. Private tutoring companies in China have grown so

427 W. Ye, *China's Harsh Education Crackdown Sends Parents and Businesses Scrambling*. CNBC, August 5, 2021. Available at: <https://www.cnbc.com/2021/08/05/chinas-harsh-education-crackdown-sends-parents-businesses-scrambling.html> (access: 11.07.2023); S. Yu (Beijing), T. Mitchell (Singapore), *China's education crackdown causes crisis for parents*, "Financial Times", August 1, 2021. Available at <https://www.ft.com/content/db7004d1-b5ad-436b-b5c4-f5faed2e1c84> (access: 12.07.2023).

428 See: X. Eryong, J. Li, *What is the value essence of "double reduction" (Shuang Jian) policy in China? A policy narrative perspective*. "Educational Philosophy and Theory", 55, 2022, pp. 1–10.

429 X. Eryong, J. Li, *op. cit.*, pp. 2–8.

large that they have started issuing shares to raise funds, such as New Oriental Education went public in 2003 on the New York Stock Exchange.

The new Double Reduction Policy affects two age groups: students of the compulsory level school and high school students, which means students from age six to age fifteen. Introduced changes include:

- ban on providing private lessons during public holidays, winter and summer vacation days,
- daily didactic activity needs to end before 9:00 pm.

In mainland China, when the curfew for instructional classes was set at 8:30 pm, some companies continued online tutoring after 8:30 pm. As a result, further legislation has been issued to impose a curfew for online tutoring in China at 9 pm. Unlike South Korea, where tutoring times were regulated by law from 5:00 am to curfew (i. e., including school hours), Chinese regulations stipulated that tutoring schedules should not conflict with official school hours. This measure responded to pupils skipping school fortutoring<sup>430</sup>. The new policy, *de facto*, prohibits offering classes on weekends, holidays, summer, and winter holidays – it effectively allows tutoring only on weekdays with limited hours. The guidelines of the new policy focus on nine years of compulsory pre-secondary education, calling tutoring companies to turn themselves into non-profit organizations. Alan Wang<sup>431</sup>, an education analyst at Beijing-based asset management firm Harvest Fund Management, comments that the scale of the crackdown on shadow education in China far exceeds expectations. The industry was preparing for some regulation but did not expect a restructuring order that would include a public listing ban, making the sector “unfit for investment”, adding that some parents will continue to pay even more for tutoring they can find. CNBC interviews across the education industry reveal that the new regulations shocked parents and left companies in a difficult position as millions of workers lost their jobs. The market size of Chinese K-12 extracurricular training companies has grown dramatically over the past three years and is expected to reach RMB 1.4 trillion in 2025<sup>432</sup>. Driven by huge demand, the “To Business” market, which provides products and services to nearly one million K-12 extracurricular education institutions in the country, is expected to exceed RMB 100 billion by 2025. With the accelerated introduction of 5G artificial intelligence and other educa-

430 J. Liu, M. Bray, op. cit., pp. 878–897.

431 K. Zhou, *The Impact and Future of the Implementation of ‘Double Reduction’ policy*. “BCP Business & Management”, 41, 2023, pp. 196–200. Available at: DOI:10.54691/bcpbm.v41i.4430 (access: 12.07.2023).

432 See: *China passes law to cut homework and tutoring ‘pressures’ on children*. “CNN Business”, October 23, 2021, <https://edition.cnn.com/2021/10/23/china/homework-law-students-intl-hnk/index.html> (access: 12.07.2023).

tional technologies, the market can improve the quality of training institutions and strengthen the position of Chinese academic training companies. Shadow education can be costly, but many parents feel compelled to enroll their children for a chance in the highly competitive college entrance examination system.

The other effect of the Double Reduction Policy aims to prevent parents from sending children and young people to extracurricular activities in the subjects taught at school and to reduce the academic burden. As mentioned earlier, the ban includes individual tutoring during holidays and weekends, which means students will be at school six days a week. Students can spend one day a week on non-school activities. It should reduce the pressure that parents feel to provide the best conditions for acquiring the knowledge necessary to cope with passing exams.

The interesting fact about the new educational policy is how it tries to limit the efforts of students and parents regarding academic education by introducing vocational education opportunities following the German model. The first aim is to redirect the activity of students and parents to achieve non-academic skills, as well as to change public opinion about the way of thinking about vocational education, which in China does not enjoy high prestige.

Outside China, the most discussed issue is the ban on employing foreigners abroad to conduct online training – especially in teaching English. According to a new law – no foreigners are employed in the online tutoring sector. From the parents' point of view, that creates another problem: the need for easy access to English language lessons designed especially for communicating practice in a foreign language. The consequences may be the appearance of younger students in the space of English-speaking countries, like the USA or Australia, due to the additional year spent on acquiring language proficiency.

The effect of the new educational policy that makes Chinese students less focused on competitively high standards can help them find themselves more in Western educational institutions that value students' creativity and soft skills. Chinese students appearing at foreign universities will not experience culture shock from a non-competitive approach to teaching – free speech, sports, and social life. As a result, Chinese students from the middle class can participate more significantly in international students' programs abroad. Until now, people from the middle class have not considered educating their children abroad, perceiving it as an expensive solution. Nevertheless, the existence of the global educational market, the troubles of providing tutoring, and the growing cost of it inside China can now be considered as an option, a way out of the situation. Thus the effect of the Double Reduction Policy may be a cultural change caused by the participation of Chinese students in international schools and in understanding what an academic career or life success is outside China.

The advantages and disadvantages of the Double Reduction Policy concerning shadow education in China can be summarized as follow:

1. lack of educational possibilities to practice spoken English – Chinese English teachers focus more on writing and listening, while foreigners concentrate on communication skills,
2. opportunities for saving money by families – because there are no extra-curricular, institutionally organized afterschool activities,
3. raising worries of parents because the student must achieve a particular grade to go to college – if one does not pass that grade, one will not go to college,
4. parents' consideration for forming small groups to hire private tutors for their children – it means hourly wages will increase, and parents will pay deposits upfront compared with if they had gone through the institution,
5. raising parents fear that with no extra time to study after school, children would be unable to catch up, being excellent in subjects taught at school.

Such the above-listed concerns were driving parents in China to spend much money on after-school tutoring and fuel the shadow education industry. The fact is that before the new policy that limited out-of-school learning, children got engaged in learning more than eight hours a day, seven days a week, so that the change could bring them relief and rest. On the other hand – it is yet to be known whether children learn enough to stand for competitive exams. However, if to look at it more broadly, Double Reduction Policy is part of a larger whole in the sense of a change, a transition from quantity to quality – the pursuit of economic growth over the last 40 years, which has come at an environmental cost, a social change and population decline. This reform does not prohibit foreigners from having one-on-one arrangements with students' parents, so it will be more individual tutoring and less based on profit companies.

As we can see from Eryong Xue and Jian Li's study that investigates the value essence of the Double Reduction Policy in China, one of the most critical elements of quality-oriented education is the governmental leading position in terms of allocating educational resources, regulating the education market, and emphasizing the critical role of schools. In addition, the new policy encourages schools to take full advantage of off-campus education, like practical activities outside of schools, using public funds for children's and youth activity centers<sup>433</sup>.

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433 X. Eryong, J. Li, op. cit.

## Conclusions

Given traditional Confucian values and the competitive nature of the Chinese educational system, it is not surprising that parents still want to tutor their children. Even when private tutoring institutions are prohibited by law, they are willing to pay for private face-to-face tutoring. These problems exist in almost every country, but culturally in East Asia, parents are more concerned about ensuring a better future for their children. If the government bans the tutoring industry without further educational system reforms, black market tutoring will cost even more than when it was legal.

It raises the question of whether the expenses the government in China spends on education are sufficient and whether teachers receive adequate training before starting their work. As we can see, considering the circumstances of educational reform in Finland – underpaying public school teachers and overworking them make it impossible to provide a quality public education. State schools should employ the best teachers with good working conditions, not private tutoring institutions. According to Junyan Liu and Mark Bray, the inadequate purchasing power of teachers' salaries is often pointed out by Chinese teachers as the main reason for engaging in tutoring. However, once the practice is standardized, the phenomenon will likely remain even as salaries increase and, due to competitiveness level, some high-performing teachers only tutor their students to maintain their reputation in the system that evaluates teachers based on their student's exam grades and promotion rates. Not only do teachers recognize the need to offer tutoring to earn an income to support their families, but some schools are also considering tutoring as a strategy to maintain student performance and activity. Even some policymakers have vested interests in tutoring, given the significant challenges of funding and other support<sup>434</sup>.

The double reduction policy will only be effective if the education system is not based on highly competitive examinations. If the selection is based on test scores, only passing the exams with the best grades allows individuals to get the best education. The double reduction policy had good intentions. However, only a re-evaluation of the culture of competition and the removal of existing institutional barriers in education that contribute to socio-economic and educational inequalities could bring about a fundamental change.

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434 J. Liu, M. Bray, *op. cit.*



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