From "Difficult Circumstances" to the "Global South": An Appraisal of Terms Used to Describe Disadvantage in Education in the Global South

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Abstract

This paper offers a critical review of terminology used to describe disadvantage in education in the Global South, including ELT/TESOL. It identifies three broad levels at which various terms are often invoked, from micro (relating primarily to the learner) to meso (the institution) and macro (the wider educational system and society). By foregrounding these levels and the relationships between them, we make explicit wider issues of colonial, post-colonial and North-South exploitation as bases for informed discussion of the factors in question. The paper proposes an interconnected framework of disadvantage in education to facilitate better understanding of such factors with consideration of both observer positioning and issues of context and evaluation criteria. We argue that school- and classroom-level challenges often identified should be situated in wider societal circumstances in order to better understand their nature and causes.

Keywords: Difficult circumstances, TESOL, Global South, large classes, disadvantage, framework

Introduction

Among Michael West's achievements as an educator is his coining of the phrase "difficult circumstances" (1960). This was arguably the first attempt within the then-rapidly-growing ELT profession/sector to recognize the important role of what we here term "disadvantage" as a key factor in understanding the nature and impact of (English language)

education in different contexts around the world (cf. later work by, e.g., Anderson, 2023; Canagarajah, 1999; Holliday, 1994). West (1960) uses the phrase "difficult circumstances" interchangeably with "unfavourable circumstances", defining them as follows:

> By "unfavourable circumstances" we mean a class consisting of over 30 pupils (more usually 40 or even 50), congested on benches (not sitting at individual or dual desks), accommodated in an unsuitably shaped room, ill-graded, with a teacher who perhaps does not speak English very well or very fluently, working in a hot climate. (1960, p. 1)

While the term was used only sporadically over the next four decades (e.g., Nation, 1975; Kennedy, 1992), it has experienced a revival in the twenty-first century due to the work of scholars such as Harry Kuchah Kuchah, Prem Phyak, Fauzia Shamim and Richard Smith (e.g., Kuchah, 2018; Phyak, 2015; Shamim & Kuchah, 2016; Smith, 2011) and their work for the Teaching English in Large Classes network (https://telcnet.weebly.com/).

To accompany the current special issue of FORTELL Journal on the topic of ELT in difficult circumstances, this paper offers a critical review of terminology used to describe disadvantage in education in the Global South, including ELT/TESOL. The paper identifies three broad levels (micro, meso and macro) at which various terms are typically invoked in relevant literatures. By foregrounding these levels, we make explicit wider issues of colonial, post-colonial and North-South exploitation (e.g., Sepúlveda et al., 2022) as bases for informed discussion of the factors in question. The paper proposes an interconnected framework of disadvantage in education to facilitate better understanding of such factors and argues that school- and classroom-level challenges often identified must be situated in wider societal circumstances in order to better understand their nature and causes.

Extant Terminology for Describing Disadvantage

As West observed, and scholars since have pointed out (e.g., Kuchah, 2018), by invoking a notion such as "difficult circumstances", we are also simultaneously invoking an oppositional notion, what West called "favourable circumstances" and others (e.g., Anderson et al., 2021; Kuchah, 2018) have called "privileged circumstances". In so doing, there is a potential danger of, as Smith has observed, "pathologizing"

(Smith & Ojha, 2015) certain contexts as inherently problematic, rather than recognizing that such circumstances are in fact the norm around the world, common across much of Africa, Asia and Latin America (Anderson et al., 2021).

Today there are many terms in use to indicate degrees of disadvantage in the Global South (see Table 1). While some have specific points of reference (e.g., "large classes", "first generation learner"), others (e.g., "difficult circumstances", "low resource contexts") are wider in their scope, and may be invoked to index a number of issues simultaneously. The arrangement provided in Table 1 suggests a three-level classification of these issues, from the learner (micro-level concern) to the classroom and institution (meso-level) to the system and wider society (macro-level concerns). As West's visually impactful description above indicates, it is often the meso-level that attracts the attention of many commentators. Yet it may be that micro-level and macro-level factors are more causative, of (perceived) underachievement and inadequate provision respectfully, and thus deserve greater attention in discussions of disadvantage. As such, in the next section of this paper, we discuss these different levels in complementary fashion to lay the ground for the framework that is to follow.

Table 1: *A Taxonomy of Terms to Describe Disadvantage in Education in the Global South*

Category	Term	Specific Referent(s)	Examples
Terms relating to the learner	low socio-economic status (SES)	parental income, profession or other econometric indicators	Hempel Jorgensen et al., 2018
	low school readiness	developmental and social preparedness of learners for education	Justice et al., 2009
	first generation learner / schoolgoer	parental background and literacy level	Malkani & Rose, 2018

<table>
<tr><td rowspan="7">Terms relating (primarily) to the school and its resources</td><td>large classes</td><td>numbers of students in lessons</td><td>Nakabugo et al., 2008</td></tr>
<tr><td>high/poor teacher-pupil ratios</td><td>ratio of students to teachers in a given dataset</td><td>Cooper, 2004</td></tr>
<tr><td>low-resource (contexts / environments)</td><td>resources and materials for teaching, immediate environment and infrastructure</td><td>Hockly, 2014</td></tr>
<tr><td>difficult circumstances</td><td>class size, resource availability, teacher competence, learner achievement</td><td>West, 1960</td></tr>
<tr><td>challenging circumstances</td><td>differences among stakeholders, top-down policies, poorly paid or supported teachers, unrealistic goals</td><td>Sowton, 2021</td></tr>
<tr><td>teacher shortage</td><td>insufficient and overworked teachers</td><td>UNESCO, 2023</td></tr>
<tr><td>overloaded / overambitious curricula</td><td>curricula which include more content than can realistically be learnt by learners in a given context</td><td>UNESCO, 2014</td></tr>
<tr><td rowspan="5">Terms relating to the education system and wider community</td><td>low-income (countries / communities)</td><td>national or regional economic prosperity</td><td>Tickly, 2011</td></tr>
<tr><td>developing / underdeveloped (countries)</td><td>national economic prosperity</td><td>Grant, 2017</td></tr>
<tr><td>the Global South</td><td>either low-income countries or marginalized countries / communities</td><td>Pennycook & Makoni, 2020</td></tr>
<tr><td>the periphery</td><td>countries and communities marginalized in ELT (cf. ‘the centre’)</td><td>Phillipson 1992</td></tr>
<tr><td>TESEP</td><td>tertiary, secondary, and primary state education provision in ELT (cf. BANA)</td><td>Holliday, 1994</td></tr>
</table>

Micro-Level Factors: The Learner, Their Background, and Related Challenges

In an article powerfully entitled *The teaching of English in difficult circumstances: Who needs a health farm when they're starving*, Maley (2001) reminds us that, in many rural contexts worldwide, before the school day even begins, "most of the students have walked at least 5 miles to get to school by 8 am. Before that, they had helped with household chores, including collecting firewood, bringing water from the village standpipe, and caring for younger siblings" (para 2). To these burdens we may also add running errands or working in the informal economy, especially in urban and semi-urban contexts (Webbink et al., 2012). Once at school, many may find application to their studies difficult if they have had little or no breakfast or have poor levels of nutrition (e.g., anaemia inhibits cognitive development; Rozelle & Hell, 2020). The logistical challenges of getting to school and concentrating on studies are significant, particularly in rural areas of low-income countries, and more frequently for female learners. Yet there are other factors, more deeply embedded, that impact on child enrolment and completion of education. Particularly in very poor communities parents/caregivers may be reluctant for their offspring to attend school due to direct associated costs, even when it is officially "free" (Hagberg, 2002; Lindsjo, 2018). They may also be concerned about loss of income from child labour (Webbink et al., 2012) – income that may be essential for food or accommodation.

The term **(low) school readiness**, while rarely used in ELT and applied linguistics communities, is common in international development literature, and typically used to refer to the extent to which a child is mentally and physically ready and able to begin basic education in a given context at the required or expected age. As Amod and Heafield (2013, p. 74) note, "factors considered in school readiness assessment include the child's emotional maturity, ability to follow directions, and ability to work cooperatively with peers and adult figures". Britto and Limlingan (2012), writing for UNICEF, expand the notion to include "ready schools" and "ready families" alongside "ready children". Concerning "ready families" they note (2012, p. 4), "supportive parenting and stimulating home environments have been shown to be among the strongest predictors of school performance during primary school and beyond".

Learners whose caregivers themselves have little or no formal education face additional potential challenges in part due to lower caregiver literacy levels. Such parents cannot easily monitor or support their child's learning, nor can they model appropriate literacy use behaviours. In India, the offspring of such parents are sometimes called **first generation learners** (e.g., Malkani & Rose, 2018), although, as Anderson (2023) cautions, this term "implies that their parents and ancestors never learnt anything, which is obviously erroneous and potentially damaging" (p. 50); he suggests "**first-generation school-goers**" as a more appropriate alternative. A number of researchers (e.g., Hagberg, 2002) have also identified complex issues related to identity and belief systems as barriers to formal educational enrolment, particularly among minority ethnic, religious or tribal communities (Mohamed et al., 2019), where parental attitudes are often, unsurprisingly, transmitted to the children (Wagner & Spratt, 1988).

The term **low socio-economic status** (SES) originates in econometric research conducted in the mid-twentieth century Global North (e.g., Sewell & Shah, 1967). It is frequently used as a broad label for those learners in the Global South who are most likely to face the greatest disadvantage in a given context, especially in large datasets. It is often linked to Western-originating demographic distinctions (e.g., middle versus working class; Tsimpli et al., 2019), although other differences—including of caste, ethnicity, race, religion and the discrimination that occurs as a result of these—may be greater influences on local disadvantage. Because it is an indicator of disadvantage that both originates in, and is designed for, large datasets, SES is limited in how much insight it can offer, particularly on an individual, class or institutional level.

Meso-Level Factors: The Institution and Teachers

Probably the most frequently discussed disadvantages are those that impact at the institutional level, likely due to their being visually apparent to exogenous observers. As discussed above, the terms **difficult** and **challenging circumstances** tend to focus primarily on such factors, as listed by Anderson et al. (2021, p. 111):

1. Large classes, typically over 40 learners;
2. A lack of basic resources, including textbooks, furniture, stationery,

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electricity and even suitable classrooms;

3. Low school readiness of learners;
4. Inadequate pre-service and in-service training and support for teachers;
5. Excessive workload for teachers and other staff.

Probably most discussed of these factors is class size, with **large classes** being the focus of two projects in ELT alone (the Lancaster-Leeds Language Learning in Large Classes Research Project and the Teaching English in Large Classes Network (http://telcnet.weebly.com/) (Coleman, 2018). The literature typically identifies classes with over 40 learners as large (Anderson et al., 2021; Shamim & Kuchah, 2016) although it is important to note that this figure is largely arbitrary and arguably a product of Western-defined norms (Ekembe, 2016). It is important to separate class size from **teacher-pupil ratios** (TPR) (Coleman, 2018)—the latter is calculated by dividing the number of students by the number of teachers in a given institution, context or system and frequently used by statisticians as a proxy for class size. However, due to wide variations in teacher contact hours (e.g., double-shifting), teacher and pupil absenteeism, and other logistical factors (e.g., room size, seating options), there is no simple, reliable relationship between these two descriptors. While relationships between TPR and teacher effectiveness have been downplayed in larger-scale research (e.g., Hattie, 2009), there is repeated evidence (e.g., Anderson, 2023; Bahanshal, 2013; Coleman, 2018) that large classes present real and significant material challenges, both for learners and teachers. In some countries classes may be so large that they prevent the use of desks and chairs, even when these are available (see Figure 1). Basic classroom and behaviour management of learners in large classes may leave teachers hoarse, exhausted and demoralized (Shamim & Kuchah, 2016); issues of methodology in large class contexts are also a concern, such as the challenge of implementing models of learner-centred education (e.g., Barrett et al., 2007) or task-based language teaching (Canagarajah, 1999). It should also be noted that in some low- and lower-middle-income countries, the opposite challenge can also be common, particularly where rural-to-urban migration is increasing—that of very small class sizes. In many remote rural schools, for example, the challenge of multi-grade teaching becomes an economic necessity (Little, 1995).

Figure 1: *Over 100 Students in a Secondary Classroom Designed for c. 30 (Malawi, 2015; © the authors)*

An alternative term that has recently gained currency is **low-resource** or **under resourced contexts/schools/settings** (e.g., British Council, n.d.), possibly preferred due to the avoidance of reference to "difficult" or "challenge" in the term. While some writers use the term literally to indicate few material resources, such as textbooks or information technology (e.g., Hockly, 2014), others use it synonymously with difficult circumstances (e.g., Shamim & Kuchah, 2016; Smith et al., 2017).

Often discussed as a component of difficult or challenging circumstances (e.g., Anderson et al., 2021; Sowton, 2021) are the challenges relating to the teachers themselves. Most obvious of these is the general issue of **teacher shortage**—a lack of suitably qualified teachers, which may be a product of either meso- (e.g., local deployment) or macro-level (e.g., low salaries) factors in low-income countries (UNESCO, 2023), particularly in ELT (e.g., Graddol, 2010). Challenges relating to teacher education are also commonly reported, including in-training curricula, teaching practicum, and in-service support (e.g., Lewin & Stuart, 2003; Mulkeen, 2010). Teacher challenges may also link, in complex ways, to their personal background (e.g., basic education), current circumstances (e.g., health and well-being, responsibilities, job security), and working conditions (e.g., workload, remuneration), all of which may affect their ability to teach effectively (e.g., Lauwerier & Akkari, 2015).

Many meso-level issues originate in policy decisions of the wider educational system in question. This includes the impact of **overloaded**

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or **overambitious curricula** (e.g., Pritchett & Beatty, 2015; UNESCO, 2014), which themselves impact directly on teaching methodology (see Inwang, 2024; Padwad & Dixit, 2018) because, as Anderson (2023, p. 51) observes, "the more content there is in a curriculum, the more teachers feel the need to 'cover' the curriculum, and typically do so through teacher-led, often rote learning." The Indian NGO Pratham has developed their *Teaching at the Right Level* initiative to attempt to combat this challenge.[1] Inappropriate language-in-education policy is another, frequently discussed systemic challenge. In highly multilingual countries medium-of-instruction choices frequently exclude learners' home languages (Mahapatra & Anderson, 2022) and introduce exogenous languages, such as English, either too soon or too suddenly for many learners to cope (Simpson, 2019). Extensive evidence also exists of the negative backwash of high-stakes, low-validity examinations at key stages of education (Kılıçkaya, 2016; Kirkpatrick & Zang, 2011), including the impact on both learner and teacher wellbeing and classroom practices as teachers engage in rote learning or "teach[ing] to the test" (Burdett, 2017), rather than developing a wider and more useful range of socio-emotional and cognitive skills, both higher- and lower-order.

Macro-Level Challenges: Societal Descriptors

There is an obvious, consistent link between quality of educational provision and societal economic prosperity (e.g., Clemens, 2004) for reasons that are likely self-evident yet often neglected in discussion of disadvantage: countries that are dependent on primary industries, particularly agriculture, have neither the financial resources nor the perceived societal imperative to provide high quality universal basic education. These two factors (what might be called respectively the *pull* and the *push* of educational development) influence each other in complex ways, both directly and indirectly. As noted above, poor rural families may lack the basic financial income to be able to send their children to school. Yet they may also lack the all-important belief in the ability of education to transform the lives of their children if few jobs beyond agriculture are available in the local community (Hagberg, 2002). In this sense, issues of disadvantage in education must inevitably be linked to the topic of economic development. As such, terms such as **low-income**, **developing** or **underdeveloped contexts/countries** are common and often seen as a means to encapsulate many of the

challenges described above. While the latter two terms (developing and underdeveloped) risk imposing capitalist or neoliberal assumptions on communities (that economic development is the sole path to social well-being), the former, while descriptively accurate, may be seen to highlight financial shortcomings at the expense of sociocultural wealth and heritage. Likely as a result of these concerns, the term **Global South** has recently increased in frequency in both academia and the third sector to indicate national and regional disadvantage. As Dados and Connell observe (2012, p. 12), the use of this term "marks a shift from a central focus on development or cultural difference towards an emphasis on geopolitical relations of power". While initially used to index the high number of low-income countries in the tropics and Southern hemisphere, the term Global South is also sometimes used (paradoxically) to identify disadvantaged peoples in societies in the geographic North (e.g., Pennycook & Makoni, 2020; Santos, 2016). In this sense, the discussion of disadvantage has shifted subtly from the apolitical description of "difficult circumstances" or lack of "resources" to a recognition of the causes of these circumstances—the sociohistorical exploitation and impact of colonization of states in the Global South by those in the North. As such, the opposite of "difficult" is no longer "privileged" or "favourable" circumstances, it is Northern globalisation/imperialism itself and, in this sense, it is this opposite that becomes the focus of critique, rather than the circumstances it has left in its wake. This is significant because it also orients critique towards issues of Northern agendas in educational development, such as the assumption that learner-centred methodologies, and the epistemologies that underpin them, are appropriate and useful (aside from the feasibility question discussed above) in the Global South, as Tabulawa (2003) argues. Two particularly influential North-South dichotomies used in ELT are those of Phillipson (1992), who uses the term **periphery** to refer to those exploited and marginalised by the Western, Anglophone "centre" of ELT, and Holliday (1994), who introduced two acronyms: **BANA** (British, Australasian, North American) to refer to those working in high-income English target language communities, and **TESEP** (tertiary, secondary, primary) to refer to those teaching English in government-funded education in countries around the world. Both Phillipson and Holliday share a concern that both the assumptions underpinning the expansion and dissemination of ELT, and the pedagogies/methodologies of the more privileged centre contexts are often transported inappropriately to

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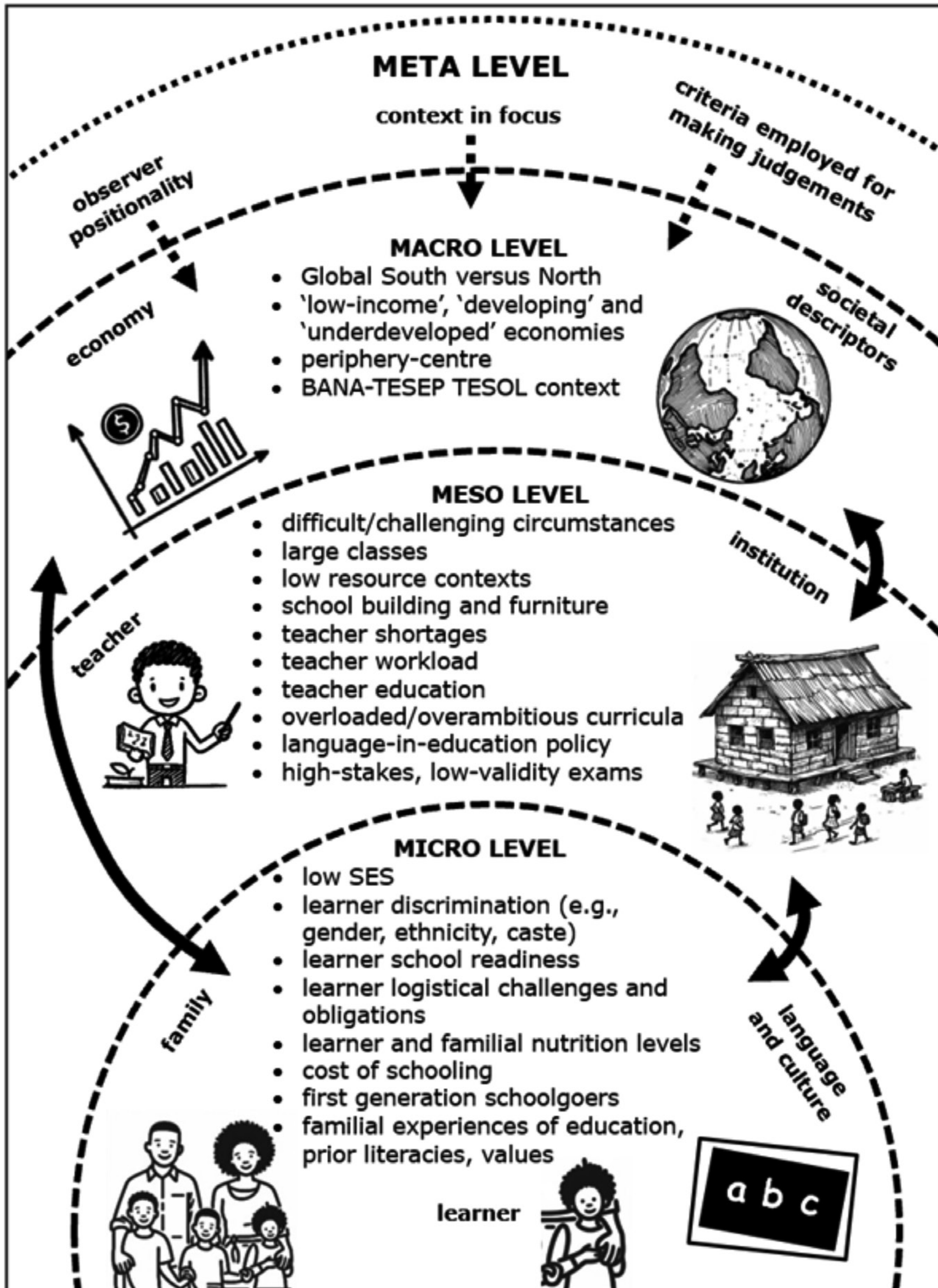
the more disadvantaged contexts of the periphery, resulting in a range of challenges, as discussed above, and poor educational outcomes that frequently end up reinforcing the North-South global divide.

A Framework for Understanding Disadvantage in Education

This article has briefly, yet (we hope) systematically, discussed what we perceive to be a fuller range of factors that contribute to disadvantage in education in the Global South than those central to discussions of "difficult circumstances" *per se*. It has identified factors that impact at three different, yet interconnected levels: the micro-level of the learner and their background; the meso-level of the institution and the teacher; and the macro-level of the system and wider society. In Figure 2, we propose a comprehensive framework for discussing and explaining disadvantage in education. Our framework is guided by three basic principles. First, educational disadvantage in the Global South often originates in issues of economic prosperity and national, local or familial challenges, including those caused by gender, ethnic, racial or caste discrimination. Second, the positionality of the observer/s (e.g., exogenous or endogenous to the context in question), the context under scrutiny (e.g., societal, systemic or institutional) and the criteria employed for making judgements (e.g., how many students constitute a 'large class'?) determine how disadvantage is perceived and presented. Last, while factors shaping disadvantage can be classified into micro-, meso- and macro-levels, the intricate and overlapping relationships among these are complex, dynamic and real.

The framework presents factors shaping educational disadvantage operating at three porous levels and it also incorporates a *meta* level to foreground the positionality of the observer/s, the context in focus and the evaluation criteria employed by the observer/s. The levels are porous in the sense that they are not meant to impose boundaries and create watertight compartments for various levels. The framework recognises that micro-level factors, such as the cost of schooling and learner school readiness, are also closely related to meso and macro-level factors (e.g., income status and economic opportunities in the country in question). In this sense, the levels help us see the factors more clearly under broad operational categories. The meta-level facilitates the inclusion of issues of epistemic justice when analyses of educational disadvantage are undertaken.

Figure 2. *A Framework for Understanding Disadvantage in Education in the Global South*



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Conclusion

Disadvantage in education in the Global South is a complex, multi-faceted and pernicious phenomenon originating primarily in histories of colonial, post-colonial and economic exploitation of numerous countries and peoples across the planet (Sepúlveda et al., 2022). It has perpetuated into the twenty-first century through the existence of continuing global inequalities and social injustices across society. In this sense, it is not solely, or even primarily a phenomenon of classroom- or institution-level challenges (e.g., 'large classes', lack of 'resources'). This article has examined its manifestation across three broad levels that are interconnected and overlapping. It has argued that awareness of all three is crucial to understanding the extent and complexity of such disadvantage. It has also argued that the positionality of the observer and the context of specific discussions also need to be explicitly addressed. Situated discussion of this type is likely to better reflect the realities and root causes of disadvantage for key stakeholders involved—learners, teachers and underfunded education systems—across the Global South.

Note

1. https://teachingattherightlevel.org/

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