

SCENARIO PLANNING AND THE TEACHER'S FUTURE ROLE

Jesus Maria Sousa¹

¹ Universidade da Madeira,
PORTUGAL.

¹angi@uma.pt

ABSTRACT

In a world like the one we live in, characterized by accelerating change and unpredictability, the need to think about the future is urgent and necessary and even more when the object of study is the public school, by its institutional nature contrary to any change. At best, the school is arrested by changes externally determined, having no space to undertake the initiative for a desired change. This paper claims for the need of anticipating the future, using a methodology of Scenario Planning.

After a brief explanation of its origins, this paper gives a special mention to Peter Schwartz and his book "The Art of the Long View", as well as the work of GBN - Global Business Network on projected scenarios on the demand of companies, research centres and country governments. Being the future uncertain, the Scenario Planning stimulates to consider alternative future projections, not necessarily utopias and dystopias, but framed by opposite driving forces.

This paper proposes an exercise of future thinking, focusing on Portugal, in a European context characterized by an economic crisis with heavy consequences on the southern countries. From a matrix that crosses neoliberalism and social cohesion, with the high and the low status of the teacher in his/her relationship with the public school, four possible futures are drawn.

Keywords: Scenario planning, Driving-forces, Teacher's role

INTRODUCTION

Scenario Planning is a technique that gives attention to some signs that we already feel at the present moment, and that will mark the future.

The scenarios appeared for the first time, related to military planning in the context of World War II. The U.S. Air Force tried to preview the activities of enemies in order to prepare strategies to counterattack. The reading of events aimed at something else as well: the decision-making. In the 60s, Herman Kahn, who had integrated the U.S. Air Force, was inspired by this kind of approach and transferred it from the military world to the business one. The idea of taking the best decision in the present for a successful future, naturally seeking the profit of the company, starts from here to be part of the concerns of managers. But it is in the 70s that scenarios gained another dimension, particularly with the work of Pierre Wack, who, in his office in London, imagined the transformation of the Royal Dutch/Shell, the international oil company, into a new department called Group Planning. Pierre Wack and others like Ted Newland and Napier Collins then looked to see which events could occur that would affect the price of oil, which was relatively stable since the end of the War. Of course the rich countries, the most consuming ones, whose economies depended on this good, made every effort to keep the price down.

There were, however, some meaningful elements in the air to be grasped. The signs that made the alarm bells sound in Pierre Wack were the following: U.S. stocks were coming to an end

at the worst time, when the demands were increasing, at the rhythm of the corresponding material welfare. Moreover, the newly formed OPEC (Organization of Petroleum Exporting Countries), mostly Islamic, showed signs of resentment for the support that the West had given to Israel after the Six Day Arab-Israeli War in 1967. The armed conflict involved Egypt, Jordan and Syria, supported by Iraq, Kuwait, Saudi Arabia, Algeria and Sudan. Giving greater attention to these facts, Pierre Wack and his team figured out that these countries could demand higher prices for their oil. Only if they were inattentive they would not do it. The single uncertainty was "when" they would do it.

These futurists then designed two groups of scenarios, each one with a set of short stories about the future they presented to the directors of the company. A first scenario, with stabilized, low prices, waiting for a possible miracle: that new oil fields were discovered in non-Arab countries. A second scenario imagined a more realistic and more plausible future: a crisis triggered by rising oil prices by OPEC. The directors of Shell listened to the two scenarios and fully understood the drastic implications that the second would entail for their business. It was necessary, therefore, to prepare themselves as soon as possible for a change of behavior in the drillers and explorers, the refiners and the traders. They had to involve the entire management chain.

When in October 1973 the energy crisis arrived, Shell was emotionally prepared for change (Shell, 2003). Having been at the beginning one of the weakest of the seven largest oil companies in the world (Seven Sisters), it became one of the 2 largest and with highest profits. The Harvard Business Review began to pay attention to Wack's thought, accepting articles for publication significantly entitled as "The gentle art of re-perceiving" (Wack, 1984) rather than "How to predict the future."

THE ART OF THE LONG VIEW

It is, however, with Peter Schwartz that future studies take a more systematic way. Schwartz, as Herman Kahn's follower, worked as a futurist at Stanford Research Institute (now called International RSI) when he met, by chance, Pierre Wack who invited him to leave the RSI to go to work for the Shell Group Planning. After 5 years at Shell, Schwartz moves to a new style of organization, called GBN - Global Business Network, which brings together experts from different scientific fields to help companies, and even countries, to gain insight into the future. According to him, the planner and the executive should be partners in this long-term vision. "The Art of the Long View. Planning for the future in an uncertain world", published in 1991, opens a new stage in studies of the future. As he says, "the end result, however, is not an accurate picture of tomorrow, but better decisions about the future" (Schwartz, 1996: 9). The emphasis is not so much laid on the description of the future (like a crystal ball), but the decision to take on the future.

At the request of governments and research centers, the GBN has already devised some scenarios that serve as reference to studies about the future, as the "Destino Colombia," to Colombia, the Mont Fleur Scenario Project, for South Africa, the Scenarios for the Future of Japan, to Japan, From the Silk Road to Silicon Road, to Pacific Asia, etc. Major economic organizations, such as Pacific Gas and Electric, Motorola, and even Nokia when it moved from Finland to Silicon Valley in California, do feel, the same way as political organizations, that they have to deal with structural changes with large margins of uncertainty in their day-to-day and should therefore think about the future in strategic terms, in order to avoid or at least mitigate potential risks.

According to Schwartz, "scenarios are a tool for helping us to take a long view in a world of great uncertainty" (1996: 3). As we see, the word is not used in the singular but in the plural:

"scenarios". The future being by nature uncertain, it is necessary to consider more than "one scenario", more than "one future", that is to say, we must consider "alternative futures", not necessarily utopias and dystopias, but futures framed by forces or trends in opposition, since it is virtually impossible to accurately determine which one will happen. The Scenario Planning methodology therefore requires, as a first step, the identification of some trends that are already being felt in the present moment, and that have a high probability of pulling the future into a certain direction, the so-called "driving-forces", considering at the same time opposing trends pulling the future in opposite directions. In a brainstorming exercise, we could draw some of them:

Military Armament \leftrightarrow Military Disarmament
Globalization \leftrightarrow Fragmentation
Inclusion \leftrightarrow Exclusion
Materialism \leftrightarrow Spiritualism
Environmental Degradation \leftrightarrow Environmental Sustainability
Idealism \leftrightarrow Pragmatism

We could mention many more other antagonistic forces that cross our times, with a tendency to accentuate increasingly. As a methodology, scenarios may help us to look at other possibilities, to think the unthinkable, to develop cognitive flexibility, circular rather than linear thought, resilience and response speed, winners' qualities considered in any organization. Basically, it is a challenge to our mental models. "And what if ...?"

Only in recent years scenarios more specifically in the field of education have been developed (GBN, 1995; ATEE-RDC19, 2003; Snoek et al., 2003a, 2003b; Sousa, 2000, 2002, 2003). I emphasize its importance by the fact that this methodology leads teachers to reflect more general issues, which go beyond the walls of his/her classroom, against the line of a technological curriculum which used to face the teacher as a mere and uncritical executor of decisions taken by assumedly hierarchic upper spheres. Now the Scenario Planning encourages reflection, putting the teacher at the policymaker highest level.

Moreover, by requiring the idealization of alternative scenarios, it "forces him/her" to consider multiple possibilities, showing that there is not a single path for the future, or a unique scenario in its "pure" form. And this is even more important if we consider that this happens with the one who in the past saw himself/herself as a master, the only holder of the truth. It is a methodology that stimulates the plural thinking.

And finally, as an additional advantage, the Scenario Planning does not leave the educator passively waiting that change happens, does not let it yielded to deterministic fatalism that permeated the whole classical sociology. It sees him/her rather as someone who is actively involved in the design of a desirable future or in the response to a less desirable one. The educator becomes an agent of change and innovation in school.

A PRACTICAL EXERCISE OF SCENARIO PLANNING

The starting point of this exercise should be a clear problem, with the indication of the precise distance to the future one wants to capture. Are we talking about a time limit of 10 or more years?

Let's assume we want to know how the social status of the teacher in Portugal will be, 10 years from now.

The scenery and the matrix

The futuristic then has to "fly" and let his/her imagination burst, wondering about the social attitudes and behaviors related to, for example, personal relationships, work, family, health, food, transport, the environment, housing, etc... We can thereby expose us to issues such as the following, without mental barriers of the present moment. Let us imagine each one of us in 2026, as young as now transported by a time machine. How will our life be then?

At the level of personal relations:

Whom do I relate with? Who are my friends? Are they my physical neighbours? Are they my colleagues? Do I say hello to everyone? Do I talk to strangers? Am I suspicious? Do I kiss and hug people? Do they give me the best place because I am a woman? Do they give me the priority because I am a child or an elderly man? Do I celebrate birthdays? Am I going out to dinner with friends? Do I invite friends to my house?

In terms of work:

Do I have a specific place to work? What is the model of work organization? Are the relations hierarchical or horizontal? Do you receive money for your work? Or do you pay to work? Is the salary adequate to the effort expended? Are there trade unions? How many years have you to work to be eligible for retirement?

At the level of the family:

How is the family constituted? How many generations does it integrate? One (a childless couple)? Two (a couple with children)? Three (grandparents, children and grandchildren)? Four? At what age is a family expected to be constituted? 20, 25, 30, 35, 40 years of age? At what age do you leave your parent's home? Is the family monoparental (only a father or only a mother)? The couple is 2 mothers or 2 fathers? When does the family get together? What activities are held in family?

In terms of health:

What is the average life expectancy? 100 years of age or more? Can I have a baby at 60? Alzheimer's disease no longer exists? Is already discovered the cure for Parkinson's disease? How are the hospitals? Can I decide when and how I want to die? Medicines are bought into ATM? Are there new diseases? Which investment is made in third age homes?

In terms of food:

Are the vegetables contaminated? Is the consumption of meat abolished? Have we banished beer from the meal? Who cooks at home? Is the food packaged? Can we simply swallow two tablets per day? Is the cutlery useless? The same food has the same taste everywhere?

In terms of transport:

Are we only allowed to walk and cycle, to stop pollution? Does each one have his own helicopter? Are there several aerial levels for no collisions? Will the buses be air-buses? How are the car parks? How much is the teleoperation?

Regarding the environment:

What percentage of gardens are cities obliged to have? Is the waste treated? Do I have to put a mask in the street? Do fish swim in clear waters?

In terms of housing:

Does the front door of my house only open with my fingerprint? Are there sensors that detect the state of mind of the residents? Is the house dust sucked automatically? Do television sets carry odors beyond the picture and the sound?

Such issues are the ingredients that will give more color to the scenery. Then yes, we can dive deep into the "driving-forces" we select, taking into account the degree of predictability and also some impact on education. A current trend, that nobody can deny, is the advance of neoliberalism. But we also have to realize that, in opposition to this trend, and attracting growing support are the social cohesion policies demanded by social movements, organized or spontaneous, given the increasing rates of unemployment and poverty, as determined by the Troika (European Commission, European Bank and IMF). I prefer using the term "social cohesion" as it is a broader concept than Communism or Socialism, thus avoiding any associations to terms used in the political parties' spectrum.

To complete the "scene", given the ideological background shaped by these forces, we may put two other trends related to the initial question, and that has to do with our social status, over which large uncertainties loom as well: on the one hand, a high social status of the teacher in the future, and on the other one, a low social status. These are the dilemmas that arise:

Neoliberalism \leftrightarrow Social Cohesion

High social status \leftrightarrow Low social status

It is in the intersection between these conflicting dynamics, represented by the vertical and horizontal axis, that the matrix is born. Thus, in 2026, as shown in Figure1, we have four possibilities for the future teacher, situated in necessarily different quadrants, but with high probability of occurrence and a major impact on education.

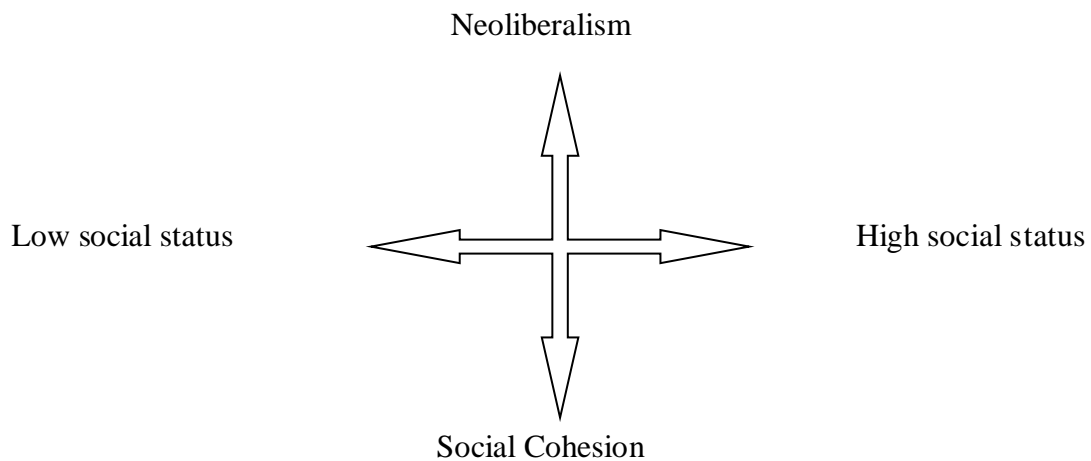


Figure 1. Our matrix

Each scenario is then drawn, using the same format, following the same line of thought, showing, for example, how different parts of the system (society, parents and students, curriculum, school organization, team teaching, etc.) interact.

The Description of the Scenarios

Scenario 1: Neoliberalism and Low Social Status of the Teacher

In this scenario, the State has little social intervention, opting to privatize areas which, curiously, classical liberalism had placed in its "hands" as one of the Rights of Man and of the Citizen: the Right to Education.

In 2026, in this scenario, any person wishing to establish a school or a university can do it with very little requirement. The idea is that the market will separate the wheat from the chaff, later. As well as there is total freedom for its opening, there is also total freedom to choose students who wish to attend institutions. And the labor market will determine which are the good and the bad schools, the good and the bad universities, refusing and/or accepting candidates, according to the educational institution of origin. This is the neoliberal rhetorics with a utilitarian view, assuming that education is to prepare students to the job market.

Following this logic, the teacher is no longer the education professional, concerned with the development of citizenship, critical thinking and participation, but someone focused on what Apple calls "techno-scientific capital", comprehending mathematics, engineering, biotechnology, microelectronics, etc., of the specific field of hard sciences, with space also for one or two foreign languages (English and Spanish, or perhaps Mandarin). While students and parents are viewed as direct consumers from this market perspective, the teacher plays a subordinate role as an employee providing services to customers, a human resource, along with other material resources that the institution has to provide. A teacher who does not have good learning results from their students (learning outcomes) is easily exempted, because it seems as if learning problems have only to do with effective or ineffective management of content, regardless of social, economic and political issues. With this technicist reasoning, the teacher is the sole responsible for the success or failure of the student, being systematically controlled by compulsive filling of enormous lists of objectives and learning outcomes to be achieved (ILOs-intended learning outcomes).

In this scenario, there is no need for any philosophical reflection or critical thinking previously stimulated in the social sciences. The arts and humanities are also seen as laziness areas of fruition and leisure, incompatible with the demands of a competitive work.

With the reduction of funding by the State and its corresponding social unaccountability, private institutions assume control over teacher education and the exercise of teaching profession, which is thus highly precarious. There are no labour permanent or at least long-term contracts. There is no full time contract, which obliges the teacher to accumulate percentages here and there, to provide welfare and prevent unemployment.

Scenario 2: Neoliberalism and High Social Status of the Teacher

The neoliberal discourse assigns a strategic role to school education believing it will be the main engine for the growth of the country. In fact, after the long period of strikes and collective manifestations that featured the education in the previous decade, leaving it in a chaotic situation, the State decided to abdicate this responsibility by passing it to the private sector.

In 2026, the public school is seen as a waste of the State, meaning laxity, indiscipline, inefficiency, and lack of rigor and of work habits.

The free exchange of foreign capital also allows that prestigious colleges and universities from other countries settle down in the main cities of Portugal by investing in the modernization of facilities and equipment, thereby promoting greater competitiveness among national and foreign institutions. Anyway, in both type of institutions, as they want to stay on top of the rankings annually published, classes are mostly taught in English.

Teachers are highly motivated to give their best, because they receive an extra bonus in salary for each student exceeding a certain level. The profession is again respected, because only the best have access to PhD courses in pedagogy, as a requirement of professional qualification.

Education is no longer free, although it is expected that the State provides loans and scholarships which amount has to be returned, as soon as the graduated enters the labour market. The text-books are preserved as a precious asset to be passed on to new generations of students. There is no waste of resources. With this business logic of "no free lunches", the teacher does not waste time with the regulation of discipline and social inclusion of problematic students. These are reserved to the ghetto made up of those who have to devote themselves to harder and more painful physical work in the future.

The teacher's authority is enhanced through specific regulations that preview warnings, punishments and even expulsions to students who prevaricate, because the success of the institution, built up with the results individually achieved by the students, depends on him/her. And the good results attract new students willing to pay more expensive fees. What is good is to be paid.

The school is now seen as a business that can be profitable, a business where education is the merchandise to transact and the teacher is the main piece of this entire engine, being for this reason socially respected.

Scenario 3: Social Cohesion and Low Status of the Teacher

In 2026, the country slowly begins to exit the impoverishment to which the payment of the foreign debt had left. The ablest had already gone to other more attractive places, to escape from hunger and unemployment. Some sought a solution in the cultivation of the soil, looking for isolated and inhospitable places to live in. The State and the market now converge on the resumption of civil rights in the access to goods and basic social services such as education, health and social security, which had remained in brackets for a decade, seeking to remedy situations of differentiation and injustices, with the support of nonprofit community networks.

People try restoring territorial balance, with special attention to the interior of the country, boosting local economies in an environment of economic growth that provides jobs for all, based on synergies between the public and private sectors. Collective projects which are aimed at the welfare of the people are then supported, because inclusion and the sense of belonging are fundamental aspects in the notion of social cohesion.

In this scenario school is seen as the privileged place for social integration and learning of habits of participation and citizenship. The methodologies used take advantage of the fieldwork and contact with people, through interviews, surveys, reports, photography and filming. Group work is encouraged for discussion around issues of everyday life.

The teacher is supposed not only to teach subject-matters, but also to accomplish an eminently social and political mission. He/she should therefore be available to go to work in troubled neighborhoods and vulnerable regions, created in the crisis period, seeking to eliminate factors of discrimination among marginalized and minority social groups. He/she should also be available to work with young people and adults who had to leave school for their survival.

Given this priority policy objective of bringing education to all, even if they live in the most remote locations in the country, it was necessary to congregate, from one day to another, a large number of teachers, after the A3ES (Quality Assurance Agency in HE) decided to close almost all training courses for teachers, thus neglecting the need to provide them with adequate training. Teacher education is so neglected, becoming accomplished only through

practice, ie, without any theoretical foundation. We know well how this can be punitive to the prestige of any profession, however noble it is their mission in society.

Moreover, the population explosion of these professionals corresponded to a decrease in their salary. The more people there are in a profession, the less you recognize them due importance.

Mobilized to sites with few living and health conditions, this teacher has to do a bit of everything: teaching, patient care, community counseling, and washing dishes, ironing, planting, harvesting, cooking, etc... The grandeur of this teacher's mission absorbs every minute of his/her day, not leaving much time to enjoy cultural goods, like reading a good book, for example.

The elitist culture and way of life, which characterized his/her past, are eliminated by an eminently popular culture. In this scenario, the teacher gets proletarian, with consequences in his/her social status.

Scenario 4: Social Cohesion and High Social Status of the Teacher

Social cohesion is stated by a democratic structure in the distribution of socioeconomic, political and cultural resources, not only by the State, as by the market itself, the family and other community networks of civil society.

In 2026, after having self-determined in relation to the dictates of the IMF, ECB and European Commission, Portuguese citizens share back again a sense of belonging and inclusion, actively participating in public affairs, with a view to the common good.

Everyone has access to basic social services such as education, health and social security, in an environment of great trust and legitimacy. All have access to decent employment and the benefits of economic growth.

In terms of urban planning, territorial imbalances created in the last decade start disappearing: it is intended that the cities become more homogeneous, improving the quality of life of degraded neighborhoods, and integrating people from marginalized social groups, previously associated to the places of residence.

In this scenario, due tribute is paid to education and school because everyone recognizes the benefits (also economic benefits) that social peace brings to society in general.

Therefore, all means are provided to ensure that the public school will continue to develop its role of redemption and social mobility, primarily focusing on civic and interpersonal dimensions, with emphasis on the values of freedom, autonomy, responsibility and solidarity, always assuring critical thinking in the construction of socio-cultural identities, being aware of each one's value. In the public school dialogue and participation of each one in the collective decisions are trained, always having the common good in mind.

The political strategy of social cohesion also involves an investment on Vocational Training, Second or New Opportunities, for those who did not have schooling at the expected age. Special Educational Needs (SEN) becomes mandatory at all levels of teacher education.

In this social architecture, the teacher gets more and more prestige, respect and consideration, being listened to for any decision involving the community, because a status of a social scientist is commonly recognized and accepted. The teacher becomes aware of his/her technical and political role, necessary to build a fair and happy society.

CONCLUSION

These descriptions, while scenes, can be complemented with stories or pictures, in order to give life to the scenarios. The stories to be invented can be narratives around characters, such as a family, a student, a teacher, a teacher trainer, a school manager, etc., a character to whom a name is given, as well as the age and other information considered necessary for a better physical and psychological characterization.

It is at this point that creativity and logical organization play together. On one hand, we say that we must fly, there should be no limits to the projection of a future (in this case 2026); but we also say there must be a consistent picture, coherent in its various elements: those physical objects of the set design, such as the furniture, architecture, fabrics, hairstyles, etc., which are virtual elements in the Scenario Planning. These are ingredients necessary to project into the future, colouring the four scenarios with stories that make appeal to the imagination, short stories discussed and prepared in a group, to be presented later, either through the description of a daily routine of one chosen character, or through drama, newspaper articles, drawings of the school building, schemes of organizational models, etc... What is interesting to note is how the same character(s) work(s) in four different worlds in 2026.

According to Ralston and Wilson, scenarios are "movies of the evolving dynamics of the future" and not "snapshots of endpoints" (2006: 16). Taken from the world of cinema or theater, and not from photography, they emphasize that it is necessary to give a dramatic and narrative feature to the scenarios, seeking to take advantage of two apparently antagonistic competences: deductive logic and creativity. "It has the inestimable strength of capturing the power of both logic and imagination in creating stories of the future" (Op. cit.: 17), not forgetting that the real future voyage consists not to seek new worlds, but to see ours with a different look.

REFERENCES

- [1]. ATEE-RDC19 (2003). Scenarios for the Future of Teacher Education in Europe, *European Journal of Teacher Education*, 26, 1, (pp. 21-36).
- [2]. Global Business Network (1995). Education and Community. Four scenarios for the future of public education, *The Deeper News*, 6 (1), 1-34.
- [3]. Ralston, B., & Wilson, I. (2006). *The Scenario Planning Handbook. Developing Strategies in uncertain times*. Ohio: Thomson Higher Education.
- [4]. Schwartz, P. (1996) *The Art of the Long View. Planning for the future in an uncertain world*. New York, London, Toronto, Sydney Auckland: Currency Doubleday.
- [5]. Shell (2003). Scenarios: An Explorer's Guide. London: Shell. http://www.shell.com/static/royal-en/downloads/cenários_explorersguide.pdf
- [6]. Snoek, M. (2003a). The use and methodology of scenario making. *European Journal of Teacher Education*, 26 (1), 9-20.
- [7]. Snoek, M. (Ed). (2003b). Scenario Planning and Teacher Education. Thematic issue. *European Journal of Teacher Education*, 26 (1).
- [8]. Sousa, J. M. (2000). Les scénarios : un sens projectif pour l'organisation de l'enseignement. In P. Boumard, & R.-M. Bouvet (eds.). *L'universel et le singulier. L'éducation comme dialectique : expériences et recherches*. (pp. 74-79). Rennes: AFIRSE. Université Rennes 2– Haute Bretagne.
- [9]. Sousa, J. M. (2002). Future scenarios in the context of global and local dynamics. *Journal of the International Society for Teacher Education*, 6 (2), 49-56.
- [10]. Sousa, J. M. (2003). Teacher Education in Portugal: analysing changes using ATEE-RDC19 scenario methodology. *European Journal for Teacher Education*, 26 (1), 77-86.
- [11]. Wack, P. (1984). Scenarios: The gentle art of re-perceiving: one thing or two learned while developing planning scenarios for Royal Dutch/Shell. *Strategic planning in Shell*, 9, Harvard: Division of Research, Harvard Business School.