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A strategy to support educational leaders in developing countries to manage contextual challenges

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The central theoretical argument of this paper is that educational leadership and organisational development and change in educational institutions in developing countries will not be effective unless school leaders are aware of the challenges posed by contextual factors that might have an impact on their professional activities. The article contributes to the discourse on educational leadership in developing countries by explicating three such sets of contextual forces that educational leadership ought to take into account: (1) the contours of the education system in which school leadership, organisational change and development occur; (2) societal and (3) international contexts. These forces are viewed through Cultural Historical Activity Theory as theoretical lens, and then illustrated with findings from an empirical study in a developing country. The article concludes with a strategic plan for exercising school leadership that takes contextual conditions into account.

Keywords: developing countries; educational context; educational leadership; organisational development and change; societal context

Introduction and Problem Statement

The conviction of late South African President Nelson Mandela that “education is the most powerful weapon you have to change the world” (Van der Rheede, 2009:1) is currently being realised by efforts to expand education to all parts of the world. These efforts spring from the view widely held since the middle of the twentieth century that education is the most important instrument to effect the modernisation of societies (Todaro & Smith, 2012:377–386), as well as the respective views that it would bring about economic growth (Tan, 2014:411–413), and contribute to the stamping out of social evils (Yeo, 1997:130). As a result of such, even less developed countries invest large proportions of their public resources in education (Naidoo & Peterson, 2015:1–3; Rajbhandari, 2011:4). It could be claimed, however, that the success of educational change and reform also to an extent depends on the quality of the leadership in educational institutions in the country in question (cf. Hallinger & Heck, 2011:149–150).

There has been a tendency among scholars of educational leadership to restrict the parameters of school leadership to matters that pertain directly to the institution in question (see Van der Westhuizen, 2013; Wolcott, 2003). It is our contention, however, that the professional leadership of a school principal (in this case) is also affected by factors beyond the school fence. Contextual forces that educational leadership should take into account are the contours of the education system in which school leadership, organisational change and development are to occur, as well as societal and international contexts. School leadership in the Masaiti District in Zambia offers an example of how schools and their leaders experience external pressures such as these, as a result of the modernisation process that the surrounding community is undergoing (see empirical report below).

Since an increasing proportion of the worldwide expansion of enrolments at educational institutions occurs in developing countries, special attention has to be given to development and change in these countries, particularly because their geographical, historical and cultural conditions differ from those of their more developed counterparts.

The abovementioned views led to the research question addressed in the investigation reported in this article, namely: *which contextual conditions should school leadership in developing countries respond to and how should they manage the development and change in their schools in responding to these challenges?*

The purpose of this article is to participate in the discourse on organisational leadership in education institutions in developing countries. This paper is a position paper, describing a position with respect to an issue, namely: identifying and enumerating contextual challenges facing school leaders, school leaders in developing countries in particular; and how to approach that issue and a rationale (that is an argument based on evidence and authoritative sources) for that position (Xavier University Library, 2014).

For this purpose, the remainder of the article is structured as follows: the next section contains the conceptual outline on which the research was based, followed by a discussion of the Cultural-Historical Activity Theory (CHAT) that explains how school leadership in developing countries could respond to the three extra-institutional dimensions of education leadership. That is followed by a report on an empirical investigation in Zambia.

Conceptual Clarification: Developing Country

There seems to be no universally accepted definition of, or criterion for what constitutes a “developing” country (cf. Nielsen, 2011). The term seems to refer to a country that is in the process of developing towards a goal that

“developed” countries have already attained. The “developed-developing country” dichotomyⁱ is sometimes applied in association with Modernisation Theory: societies in developing countries are regarded as being in the process of modernising towards standards already achieved by more developed countries (Fägerlind & Saha, 1984:49). As exponents of this theory, Inkeles and Smith (1974) describe “modernisation” as the process of humans becoming more modern, in the sense of learning to be more open to new experience, able to form beliefs based on rational argumentation and independent critical thinking, rather than on traditional belief transmitted from parents to children; confident in their ability to organise their own lives, to master challenges; and with faith in human beings as the dominant agency regarding the environment.

The International Monetary Fund (2015:47) does not use such relatively stringent criteria: it merely considers the United States of America, Canada, all Western European countries, Japan, Australia, New Zealand, the Republic of Korea, the Hong Kong Special Administrative Region, Singapore, Israel, Slovakia, Slovenia, the Czech Republic, Latvia and Estonia as developed countries, and the rest as developing countries.

The next section contains an outline of three sets of external (extra-school) contextual forces with which school/educational leaders in developing countries are faced as they lead their institutions through processes of modernisation, of change and development.

Literature Survey: External Contextual Forces

Studies located in the developed countries dominate in the current corpus of literature on school leadership, while there is a dearth of publications on school leadership in developing countries (Weinstein & Hernández, 2016:242). Salient topics on the research agenda regarding educational leadership include: the definition of educational leadership, the training of school principals as educational leaders, the recruitment of principals as leaders, the working conditions and duties of school leaders, and performance appraisal of educational leaders (Weinstein & Hernández, 2016 :241–263). Such a research agenda that pays very little attention to extra-school contextual factors resonates with the narrow conceptualisation of educational leadership (as explained above).

The most extensive international survey of school leaders(hip) was that of the Teaching and Learning International Survey (TALIS) (cf. Becker, 2013). In that study, a sample of principals in 24 participating countries completed a questionnaire. The questionnaire, informed by the corpus of literature and scholarship on the topic, contains questions on the following aspects of the professional lives of school principals: biographic

particulars, school background, school management teams, duties and responsibilities (especially with respect to induction, monitoring and performance appraisal of teachers) and job satisfaction (Becker, 2013). Definitions of leadership also tend to lack reference to context. In not a single of the 33 definitions of leadership enumerated by Helmrich (2016) is there any mention of context. In one of the very few instances of reference to context, Dempster (2009:23) correctly states that “the school is not an island, but part of a global village” and “There are wider worlds in which schools work ... global influences ... as well as national legislative, policy and regulatory requirements.” Dempster offers no comprehensive scheme of what these contexts entail, however.

Theoretical Framework

We examined the potential of several theories to explain the dynamics of what occurs in a community and/or a school, also in times of change and development. Our choice fell on the Cultural-Historical Activity Theory (CHAT),ⁱⁱ because it seems to possess more heuristic potential in this regard than, for instance, transitivity, Social Action Theory or Critical Theory (also see Halverson, 2002:244). Postholm (2015:46) describes the CHAT as a useful research approach for studying change and developmental processes. It can be fruitfully applied in the examination of contradictions in organisational structures, interventions and transformations (cf. Engeström & Sannino, 2010:15–24).

Since its inception, the CHAT was concerned about the relationship between subjects and their environment, and about individuals’ interactions with cultural, historical and institutional settings (Yamagata-Lynch, 2010:15–16). As such, it is well suited to explicate the “self” (the school principal, for instance) in his/her embeddedness within socio-cultural contexts (Stetsenko & Arievitch, 2004:475). An agent – whether a community (also a community leader), a person (such as a principal) or an organisation (such as a school) – finds himself/itself involved in an activity system made up of several relations. In addition to this, the school and its surroundings form two separate though interacting activity systems.

Change and development can be explained as follows in terms of the CHAT. The actions of an agent, for instance a school principal (the subject), are always contextualised by the circumstances and conditions that prevail in the community, and his/her actions conversely impact on the community life. In view of this, the CHAT can be regarded as a transactional approach: it offers a vision of human nature and development as being rooted in material social practices that on the one hand produce and engender social interactions and human subjectivity, while on the other hand, they

are themselves reciprocally produced by these interactions. The CHAT emphasises the ontological unity of inter-individual (for instance, in organisations such as schools) and intra-individual processes as being mutually dependent poles on the continuum of purposeful transformative practice (Stetsenko & Arieivitch, 2004:476). While there is a great awareness in the CHAT of the individuality of the agent (the subject), there is also appreciation of the social and other contexts of the self; there are continuity and reciprocity between individuals and their contexts. The result of this view of the individual (agent, subject) is that the self of the individual is not reified as fixed, predetermined and independent of social processes (for instance in a school, community or country); the self of the individual is seen as being rooted in clearly defined patterns of social practice. The relationship between the individual and the context is transactional and dialogical; the individual is constantly involved in a relational dialogical process with other individuals or groups of individuals (Stetsenko & Arieivitch, 2004:476–489).

According to the CHAT, the social environment is not just a social factor in individuals' lives, but rather a source of change and development (Veresov, 2010:84). The dialectical concept of contradiction plays an important part in the CHAT. Such contradictions take the form of historically formed tensions that can be detected and dealt with in real activity systems. More importantly, contradictions are the driving force of transformation (Engeström & Sannino, 2010:4–5). De Beer and Henning (2011:207; also cf. Stetsenko & Arieivitch, 2004:494) have a similar view, when they explain that community activity “inevitably leads to conflict and tension in order to generate change”. This is particularly true, Lampert-Shepel (2008:212) observes, in situations of growing diversity and shifts of moral and intellectual paradigms when equity issues, multiple contradictory reforms and power differentials abound (as are bound to be the case in developing countries – see discussion below).

The term “context” that appears in the title of this special volume of articles and also in the title of this article, can likewise be viewed through the CHAT lens or filter (cf. De Beer & Henning, 2011:207; Halverson, 2002:246). Dempster (2009:23) explains that “the school is not an island, but part of a global village; [...] there are wider worlds in which schools work [...] global influences [...] as well as national legislative, policy and regulatory requirements”. Schools and principals not only have to deal with a local social, cultural, historical, geographical school context, etc.; they also have to come to terms with the challenges resulting from wider contexts. In terms of the CHAT, a school has to cope with internal contextual factors arising from its own organisational dynamics, but also with

external contextual factors from the surrounding community, as well as from the wider world beyond the community, as Dempster has argued. The professional role of the principal as an educational leader is co-shaped by such external factors and forces.

This view of the professional role of the principal as an education leader and change agent will be demonstrated below, with a discussion of three sets of external contextual pressures, with which schools and school leaders in developing countries must contend in the early twenty-first century.

The external context of schooling and school leadership in developing countries

Education leaders (principals) in charge of schools in developing countries, like their counterparts in more developed countries, are constantly involved in activity systems, as described above. School principals work with standard or widely accepted knowledge and insights regarding education, leadership and management, teaching and learning, the curriculum and discipline, financing, staff services, support services and discipline (to mention only a few). Principals in developing countries are compelled to deal with additional contextual matters unique to developing countries that might either contribute to or detract from the quality of the work of their schools. Put differently, school principals in developing countries reflect on their developing country contexts in addition to the standard knowledge that all principals should possess (Yang, 2014:295). What they reflect on and what they have to cope with depend on the particular conditions prevailing in a school, the local conditions and the challenges to the school, as well as the community and the developing country in which the school is situated (cf. Neuman, 2003:402–404). The following are among the additional items of information with which education leaders in developing countries have to reckon, in steering their schools towards change and greater sophistication. Three sets of contextual forces that educational leadership should take into account are: (1) the contours of the education system in which school leadership, organisational change and development occur; (2) societal; and (3) international contexts.

First facet of external context: education system

The principal of a school in a developing country in the throes of change and development is working in an education system that was constructed and functions in a particular manner. Principals also find themselves amidst a worldwide trend to decentralise power, duties and responsibilities right down to the level of individual schools (cf. Rajbhandari, 2011:3–9). This trend results in education leaders in developing countries receiving additional duties when this trend begins to affect their schools.

Principals in developing countries furthermore deal with budgetary allocations, where per-learner public spending on education in their countries is substantially less than in developed countries. While the annual public spending per secondary school learner in developed countries is between US\$9,139 and US\$18,508, the corresponding figures for developing countries are between US\$12 and US\$3,672 (Wolhuter, 2011:12). Principals in developing countries are constantly faced with the challenge of providing education of good quality, despite the small amounts of money available for their schools. The relative poor funding levels of schools in developing countries imply that schools in those countries are equipped with poor physical infrastructure and high learner-per-teacher ratios. In

Africa, for example, the pupil/teacher ratio at primary school level is 38.4, whereas in Asia it is 23.5; in Latin America 20.3; in North America 18.4; and in Europe 14.1 (world aggregate 24.2) (United Nations Educational, Scientific and Cultural Organization (UNESCO), 2015).

Principals working in developing countries furthermore operate amidst a lack of efficient civil services in their countries, also with respect to the public education system (cf. Nay, 2013:326–327), and therefore have the task to find ways to compensate for this shortcoming in their education systems and in their schools.

Principals in developing countries are also in situations where schooling will be in greater demand than ever before (see Table 1).

Table 1 Growth in Enrolments Globally, 1960–2010 (x 000)

Level		1960	1980	2000	2010
Primary education	Developed Countries	124,077	12,125,454	68,657	64,612
	Developing Countries	121,982	291,968	587,069	631,449
	Developing countries as % of global enrolments	49.6	69.94	89.53	90.7
Secondary education	Developed Countries	46,429	80,574	431,010	404,258
	Developing Countries	21,788	96,611	238,853	258,749
	Developing countries as % of global enrolments	31.94	54.53	35.66	39.03
Higher education	Developed Countries	9,599	29,179	35,862	47,779
	Developing Countries	2,625	16,763	63,438	133,439
	Developing countries as % of global enrolments	21.47	36.49	63.89	73.63

Note. (Sources of 1960 and 1980 data: UNESCO as cited by Coombs (1985:4); 2000 and 2010 data: UNESCO (2016).

Principals in developing countries (henceforth principals) also have to contend with curricula heavily influenced by models inherited from developed countries, as scholars of post-colonial and world systems analysis constantly remind us (Wolhuter & Van Niekerk, 2010:10). This emphasises the need for indigenising curricula in accordance with the needs and contexts of the developing countries in question.

Second facet of external context: societal context

The geography, history, social composition (demography), economy and ecology of the surrounding community and the country are contextual forces impacting on a school. Phenomena that are relevant in this regard include the way that the country, community and school may be affected by the environmental crisis (global warming; atmospheric, water and sea pollution; soil erosion and depletion; destruction of marine resources; fresh water depletion; deforestation and the destruction of biodiversity; cf. United Nations Environment Programme (UNEP), 1992); the world population explosion (cf. Friedman, 2009; United Nations (UN), 2015), which is particularly observable in developing countries, since they

carry an increasing percentage of the global population (cf. Azernert, 2014:166–167); the fact that the age profile of developing countries is changing in favour of a younger population; the increased movement of people from developing countries to developed countries; and the rise of large cities in developing countries, with large numbers of people in these cities staying in informal housing (“slums” or “squatter camps”), and for whom education ought to be provided.

Recent scientific and technological developments also could affect the duties of leaders of schools in developing countries. The availability of information and communications technology could open up new vistas for teaching and learning in even the deepest rural areas, while phenomena such as cyber-bullying might affect the peace in schools that previously had no access to such technology. A salient force impacting on a school is the economy of a country, particularly the fact that widespread poverty is still rife in many developing countries. Most of the world’s poverty-stricken people live in developing countries (World Bank, 2015:35). In past decades, developing countries have experienced the rise of a massive informal economic sector that provides a living for many citizens.

Schools in developing countries are tasked with the role of contributing to the skills of the people who make a living in such conditions.

Principals manage schools and staff located in a rising knowledge economy. The following phases have been distinguished in the histories of (national) economies: a hunting and gathering phase; an agricultural phase (and/or other extractive industries such as mining, fishing or forestry for trade and profit); a manufacturing industries phase; a services phase (where services constitute the majority of economic activities); and currently, a knowledge economy phase, in which the production and consumption of new knowledge have become the engine of economic development (Pang, 2013:19). Basic knowledge of the different phases helps a principal to position his/her school, community and country.

Principals lead schools in societies where the importance of the primary social grouping, the family is diminishing (due to migrant labour, for instance). There is a need for schools to put plans in place to compensate for this. Principals are also leading schools in increasingly multicultural societies, where the philosophy of multiculturalism is gaining ground, as well as in developing countries, amongst others, as a result of the Creed of Human Rights, which has gained momentum worldwide since the mid-twentieth century. The same applies to the recognition of minority interest groups such as Women's Rights, eco-conscious groups and other single-issue lobbies (cf. Biseth & Holmarsdottir, 2013:1–11).

Concomitant with – and no doubt facilitated by – the demise of the central power structures of the nation state, is the growth of democratisation, particularly in the countries of the erstwhile East Bloc and of the Global South (cf. Wolhuter, 2014:105–106). Although education and schools are expected to serve as vehicles of upward social mobility (cf. Hoskins & Barker, 2014), there are indications that the eventual places that children attain as adults in the socio-economic hierarchy will be determined by the socio-economic status of their parents, rather than by their own educational achievements (cf. Halsey, 2013; Tunç, 2011:1943–1944). It is incumbent on principals to comprehend this situation so as to appropriately respond.

In addition, despite the frequent claims that the modern age is a post-religious, secular age, school principals steer schools in societies where religion persists as an important factor in individual lives and social dynamics of the school community, both in developing and developed countries. A recent survey in 230 countries found that 84 percent of the global population still regard themselves as belonging to some religious group (Pew Research Center Religion & Public Life, 2012). Increasing individualism, the rise of minority interest groups, and the mass media of con-

temporary society, compounded by increasing population mobility and democratisation and rampant individualism, are sparking a diversity of value systems that are replacing the traditional, homogeneous societies that were previously characterised by specific, uniform value systems. This is the case in developing countries as well (Fricke, 2015:503–504).

Third facet of external context: International context
Principals of even the remotest schools have become part of the international environment. They and their schools feel the impact of recent global drives, such as the Education for All drive (1990), the Jomtien Declaration (2000), the Dakar Meeting (2000), the Millennium Development Goals (2000) and the Incheon Declaration (2015) regarding a world education vision for 2030 (cf. UNESCO, 2015).

Principals and their schools could also benefit from the opportunities in international aid programmes that gained momentum after the conclusion of the Cold War around 1990. They are in an environment of fierce competition for financial assistance by other developing countries, in a globalised world, where any advantages that a nation might have had because of endowment with natural resources or strategic geographical location in the world have disappeared (Friedman, 2009).

Despite policies and practices to devolve decision-making powers to school level, national authorities – also in developing countries – tend to monitor the performance of schools, in the spirit of neo-liberal economic policies, based on the principle of performativity. As school leaders, principals are thus held accountable for the school's performance, even to the point where the renewal of their contracts might be at stake if the school underperforms. International tests (such as those of the International Association for the Evaluation of Educational Achievement (IEA), or the Programme for International Student Assessment (PISA tests) organised by the member countries of the Organisation for Economic Cooperation and Development (OECD)), are currently being conducted in an increasing number of non-OECD countries as well, including several developing countries (cf. Smith, 2016:7–8). These tests are widely regarded as the litmus test for the quality of education offered in national education systems and in individual schools (Smith, 2016).

Empirical Investigation

An empirical study was done in schools in the Masaiti district in Zambia to either confirm or refute the above theoretical insights. The study centred on the experiences of the leadership of the schools under the auspices of the Foundation for Cross-cultural Education (FCE).

Research Method

Nine focus groups, each consisting of eight people per group ($n = 72$), were organised, based on purposeful sampling and drawn from the target population (the Masaiti community) served by the FCE in Masaiti. The groups respectively consisted of experienced and knowledgeable community and government teachers, community workers, traditional leaders, FCE members, religious leaders, small scale farmers, informal business leaders and the inhabitants of a village. The interviews yielded the following results.

Education system context

The FCE education complex finds itself at the intersection of two education systems, namely the national education system of Zambia, and the international network of FCE education projects. Located in Zambia, it had to register their schools in Masaiti as private educational institutions, with the Zambian Ministry of Education, and as such had to comply with the requirements the Ministry set in terms of curricula, minimum qualifications of teachers, and objectives of education in Zambia (cf. Masaiti & Chita, 2014:434, 442–450). Zambia launched an educational decentralisation policy in 1990, which aimed at the devolution of power from the centre to the local level in districts in schools (Masaiti & Chita, 2014:446). This policy increased the decision-taking powers of the leaders of the FCE schools in Masaiti. At the same time, the FCE Masaiti schools form part of a network of schools in seven countries in Africa and Asia. These schools are directed from the FCE head office in Wellington, South Africa. The FCE's Christian philosophy and its views of education as an agent of transformation in development, inform the mission and organisational culture of the FCE Masaiti schools. The budgetary constraints of a missionary society determine the nature and scope of the services and facilities which the FCE Masaiti schools can provide.

Societal context

The population explosion, combined with the poor and failing structures of state services, also in the field of education, result in an urgent demand for the supply of private education, such as that offered by the FCE. Population pressure and resultant deforestation and soil depletion have created an urgent need for education for sustainable development. The FCE schools find themselves in a context where unemployment and poverty are rife, where shortages of food and malnutrition is experienced, especially during the dry months of the year, and where the quality of life in the community is hampered by a lack of basic knowledge of healthcare. At the same time, modern influences lead to non-traditional practices in the community, such as broken families, and a dis-

ruption of community relationships, while, in the context of the migrant labour system (which sees many mine workers live at a great distance from the mines stay for the working week in mine dormitories) copper mines have given rise to a high incidence of a variety of social maladies, such as prostitution. The effect of secular humanism is destroying African values in cooperation, and breeds selfishness amongst individuals. A school feeding scheme, as well as imparting knowledge of family structuring, functioning, cooperation and learning to trust one another, have become part of the school and the type of education offered.

International context

One of the factors emanating from the interviews is the value attached to a command of the English language (as determined by job market forces). Zambia feels the effect of the international economic tides, especially commodity prices (copper, especially). Parents and community leaders sense the importance of education in a competitive, globalised world, and the quest for quality education is constantly mentioned as reason why parents prefer to send their children to FCE schools, rather than to state schools.

Strategy for school principals in developing countries to consider

The empirical investigation in Zambia confirmed the importance for principals as school leaders in developing countries to be informed about the contextual conditions which might impact on the effectiveness of their schools, which could ensure that their schools remain relevant in their communities, and able to contribute to the growth, change and development of their countries. Education leaders in developing countries are not only challenged to keep up with developments in the world, just as their counterparts in more developed parts of the world might be, but they have the additional task of taking account of both intra- and extra-institutional contextual developments that might be unique to their particular situations as leaders of schools in developing countries.

Principals may consider using the following strategy that flows from the discussion so far:

The cultural-historical activity theory devotes attention to various aspects of activity systems: the subject, the object, and outcome of an intervention or transition, the means through which this is effected, the division of labour, the rules according to which everything in the system is done, and the community involved. In the following discussion, the focus is on the school principal as subject, that is, leader of the school and significant person in a developing country context. Apart from the normal tasks that principals all over the world have to attend to, it has transpired that principals in

developing countries ought to attend to the following.

Principals should see themselves as the leaders of their schools, as well as community leaders. In the latter capacity, they have to be keenly aware of the impact of the three sets of external factors discussed above, inasmuch as those factors are relevant to their community and their school. They should, furthermore, occasionally look beyond the fences of their schools and be aware of the needs of the communities that they serve. They should then ascertain whether their schools effectively help the community (through equipping the children and their parents) to meet those needs. It follows that they should also be constantly prepared to make the necessary adjustments to the functioning and offerings of the school in order to remain valuable and relevant to their communities. Their focus should be broader than the school itself, in that they should be constantly prepared, not only to steer the school in desired directions, but also contribute to the reorientation of their communities in order to meet the demands of an ever-changing world, a world that is inexorably moving towards modernisation. In the process, they have to help their community take charge of its own fate, and not leave everything to chance. This is of course a momentous challenge for a school principal functioning in a largely unsophisticated community. It stands to reason that most of these interventions on the part of the school principal will remain ineffectual, unless there is cooperation and trust between the school (leadership) and the community. The principal as community leader also has a function in this regard.

Conclusion

Principals as education leaders in developing countries are entering into an unknown future, but they have to be clear about the outcome towards which they are striving in this unknown future. Understanding the contextual factors that impact on their future as education leaders could play an important role in their strategy to cope with the challenges of the future.

Notes

- i. Criticism of this dichotomy goes beyond the scope of this article. It is sufficient to say that at least three criticisms can be levelled against it. First, the assumption that countries are internally homogeneous is incorrect, as virtually all countries are characterised by internal diversity with respect to, for example, income levels. Second, the developing countries cover a huge spectrum, from the so-called emerging economies to the so-called least developed countries (the poorest countries on the globe). Third, this dichotomy privileges the Western countries and their societal organisation as the standard to which all societies should ideally develop.
- ii. The purpose of this article does not require a detailed discussion of the origins or the evolution of the

theory. The following may be consulted for information in this regard: Asghar (2013:19–22); Postholm (2015:43); Stetsenko and Arievidtch (2004:480–481); Yamagata-Lynch (2010:13–15, 25–26).

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