

45

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*Worlds of Education*  *Education International*



**CHALLENGES TO PUBLIC EDUCATION  
SYSTEMS GLOBALLY**

**SELLING OUT THE RIGHT TO QUALITY  
PUBLIC EDUCATION FOR ALL**



**WHEN PRIVATE INTERESTS  
INTO PUBLIC EDUCATION  
SIMPLY DO NOT GO**

**BLENDED LEARNING IS THE  
NEXT ED TECH REVOLUTION**

**REFORMS AND TEACHERS**

# EDITORIAL

Strengthening Our Public Education Systems

## ARTICLES

Selling out the Right to Quality Public Education for All  
Challenges to public education systems globally  
Market Fundamentalism Deforms Education  
When Private Interests Into Public Education Simply Do Not Go  
Hidden privatisation in public education  
Blended Learning is the Next Ed Tech Revolution  
Reforms and teachers  
Always Learning  
Commercialization of education in the Philippines

## STRENGTHENING OUR PUBLIC EDUCATION SYSTEMS

An introduction to issue 45 of Worlds of Education

By: Fred van Leeuwen

Theme: Trade and Education



In this special edition of 'Worlds of Education' we have placed the focus squarely on the theme of privatisation and commercialisation of our education sectors. As one of Education International's top priorities moving forward, our campaign to counter the privatisation of public school systems covers a vast array of challenges confronting educators around the world.

This is why our guest editor Carol Anne Spreen of New York University has brought together a diverse group of

contributors who have illustrated with great clarity the scope of the challenge facing many of our affiliates. With perspectives ranging from academia, the classroom and teacher unions, this edition provides a wide ranging look at how privatisation affects teachers, students and public education as a whole. From the campaign itself, to the businesses seeking to profit off of our public systems and the efforts underway to implement legislation to protect public education, this edition brings into clear focus not only the threat of corporate interests, but the global efforts underway to subside them.

When the United Nations set its new global development agenda last September and declared that primary and secondary education should be free, it reinforced the importance of public education. But too many countries are heading in the opposite direction. Authorities are outsourcing publically funded education to profit seeking corporations at an alarming rate. Pay as you learn, seems to be the axiom. In the world's poorest nations so called "low fee" education comes at an ever rising cost for those who cannot afford it. Even where public education remains strong, we are witnessing the influence of private companies through testing and curriculum. The commoditisation of public education must be brought to a halt, which is why Education International' Seventh World Congress last July adopted a resolution to counter the wave of privatisation.

Clearly, we do not want corporations to run our schools like businesses on a for-profit basis and increase social inequity, where they set up supply chains, or where they invade teachers' professional space and dictate what and how to teach. We know from our own research that the simplistic transfer of ideas from the corporate world does not advance the quality of our school systems. The idea that quality can be improved by introducing standardised testing, league tables and performance pay, by ranking schools, by measurement, is false. It does not work.

The articles in this edition highlight these topics in great detail and make clear why our public school systems are the most successful public enterprises ever, which is why we must resist any attempt to weaken them.

Enjoy this latest and important edition of Worlds of Education. We welcome and look forward to all of your comments and queries.

## ABOUT THE AUTHOR



Fred van Leeuwen

General Secretary of Education International

## SELLING OUT THE RIGHT TO QUALITY PUBLIC EDUCATION FOR ALL

An introduction to this issue's topical focus

**By:Carol Anne Spreen**

**Theme:Trade and Education**



**Education is a human right and a public good. This is a principle on which Education International (EI) and contributors to this special issue of Worlds of Education stand. However, the right to a quality public education for all is slowly being chipped away at. Several scholars in this issue of "Selling out the Right to Quality Public Education" have been working with EI clearly identified that perhaps greatest threat to reaching high-quality education for all is the accelerating use of market mechanisms and privatisation in education.**

In this issue we bring together scholars, educators and advocates who have been working with EI in a global anti-privatisation effort. These scholars are working around the world to raise awareness about how and why education is being placed in the hands of corporations or "edu-preneurs", instead of educators. The articles in this issue lay out both the broad ideological underpinnings of the marketisation of education, as well as, provide evidence of how it impacts schools, classrooms, teachers and students on the ground.

One manifestation of the privatisation movement – often referred to as the Global Education and Reform Movement, or GERM – is both a commercial exercise and an ideology. In Market Fundamentalism Deforms Education Steve Klees details the detriment of neoliberal policy reforms to education since the 1980s. A global emphasis on the market has led to education being blamed for unemployment and other economic problems, while private business and market practices have distorted perceptions of education as a public good. In the presence of these corporate driven reform policies, Klees suggests that EFA and the MDGs were empty promises, and warns the same of the SDGs if we do not make significant changes in how we fund and support the public sector, including education. His plea is to abandon neoliberal ideology about education and to re-establish the legitimacy of government and participatory democracy in schools.

Other articles in this issue illustrate how GERM is led by powerful and influential "edu-businesses" and "edu-preneurs" across the world with enormous power and resources devoted to undermining and circumventing funds from the public sector. Policy ideas such as school choice, competition, accountability, as well as standardised tests and curricula, pedagogy and teacher evaluation, are increasingly being promoted and 'sold' to governments by corporations and private foundations. In her article Long Division: When Private Interests Into Public Education Simply Do Not Go! Susan Robertson suggests that countries around the world are committing themselves to a particular form of market logic: "that education will be more efficient if it operates according to the rules of competition (choice, standards, information about performance, and so on leading to

better quality) and that private firms will deliver goods and services more efficiently than governments (leading to cost savings)." Robertson explains that the market model can be contrasted with a public investment model; "a comprehensive education system premised on universal access, the preparation of citizens for the economic and wider political society, and equality. The mechanisms to ensure quality include the preparation of high quality teachers, equitable funding to schools, high quality infrastructures, and whole child pedagogy. The drivers of outcomes are that public ownership, public responsibility, and accountability through democratic processes will ensure better quality teaching and learning environments for teachers and students and thus better learning outcomes." Additional articles in this issue begin to explore in more detail the mechanisms and drivers of the current increasingly corporatised system.

Under the market logic of reform edu-businesses are promoting and positioning themselves as offering 'solutions' to the national policy problems of raising standards and achieving education improvements. Their self-promotion extends to active participation in policy making and forming networks as a means to agitate for policies which offer further opportunities for profit. In a summarised excerpt of Hidden Privatisation scholars Stephen Ball and Deborah Youdell discuss hidden forms of privatisation that effect education systems across the globe (for the full report, please [click here](#)). Ball and Youdell argue that hidden privatisation tendencies in many cases are not named as privatisation, but are inserted in policies that bring about a new language. This language becomes the new norm and assists the state in making the public education system to look and function more like a business.

The long-term challenge for ensuring the right to quality public education is when governments outsource education activities and service provisioning to profit-making corporations, given the ability of private actors to assert their influence in policy processes and steer education agendas in ways that may not be in the best interest of students, teachers and societies at large. Throughout the world we've seen increasing activities of private for-profit actors enter the market through the new education technology sector (e.g. selling software and data management systems to address new accountability measures; providing one-stop shopping for online curriculum, assessment, and teacher training models; creating "schools in a box" that can be purchased and distributed globally; etc) that standardise learning and divert resources that could have gone toward more teachers and education support personnel, facilities or programmes for students in the public sector. In the article, *Myth: Blended Learning is the next ed-tech revolution: Hype, harm and hope*, Phil McRea discusses how on-line learning is not a new or revolutionary idea, as suggested by corporate education reformers and business training firms, who tout the virtues bringing the world to poor kids through e-learning that are sourced through private companies. He cautions that in its current state these knowledge solutions undermine teacher knowledge and autonomy and make students passive consumers rather than empowered learners. These models not only control the content of the curriculum and tests, they extract teachers and replace them with "facilitators" or "individual learning specialists." He argues that technology should be used to help employ students learning abilities, not replace the authority of the teacher or their role in the classroom.

Turning to more directly to impact of corporate reform and GERM on teachers and teaching, contributions by Toni Verger, Hülya Altinyelken and Mireille de Koning have compiled a set of case studies that explore more in-depth the role that teachers play in global policy processes, and the effects of market-based policies on teachers' labour and professionalism. Global Managerial Reforms and Teachers shows that corporate sector educational reforms based on teachers' work fall mainly under the global tendencies of new managerial and high-stakes accountability reforms. They refer to them as Global Managerial Education Reforms (or GMERs) and show how they set out to improve countries' competitiveness by upgrading students' learning achievement and, at the same time, enhancing the efficiency of education systems. Their findings suggest that reforms aim to drastically transform the way the public sector operates in education by introducing private sector participation, incentives and a new culture of competitive performativity. More specifically, GMERs advocate that the public sector should learn from the private sector managerial culture and adopt their rules, values and techniques. GMERs promote managerialism through new methods of teacher evaluation, new developments of competence-based curriculum, new decentralisation processes that emphasise school accountability. However through a series of case studies Verger et al. find most of these reforms put more pressure on teachers' everyday work and transfer the entire responsibility of student achievement onto teachers themselves. The vast majority of these high stakes accountability policies ignore the social context of teachers' work and the

structural conditions of the learning processes. What is more, incentive-based mechanisms like merit pay are usually punitive and almost never related to work and performance in schools located in underserved areas.

While many of these reforms are as Ball and Youdell suggest “hidden” and not always understood as “privatisation of public education”, what is increasingly becoming very visible is how certain prominent figures in financial circles and at large foundations have become interested in corporate education reform. This includes setting up for-profit schools and service providers for education, encouraging their expansion throughout the world and providing grant support to some of them. Several of these edupreneurs, saw a market opportunity and started running schools for profit, for example, allowing the introduction and expansion of so called “low-fee” for-profit private schools, corporate backed and owned school chains, such as Bridge International Academies (BIA) and Affordable Private Education Centres (APEC). A key focus of EI research in this area has been on Pearson, Bridge and other privatising edubusinesses.

Hogan, Lingered, and Seller’s article *Always Learning: The Rise and Rise of Pearson PLC* analyses the growing role of commercial companies in public education and how increasingly influential edu-business can affect public interest when their main priority is profit-making. The authors take a particular look at Pearson PLC, which recently defunded their philanthropic foundation and declared they would pursue their corporate responsibilities through the social impact of its everyday business. Through its Efficacy Framework review process and The Learning Curve reform recommendations, Pearson has laid out for education providers both their policy “problems” and the “solutions,” available for purchase through Pearson products. Hogan et als conclude with a warning that the increased involvement of nondemocratic, commercial entities in public education corresponds with the diminishing involvement of democratic, public involvement in education policy. The authors show how Pearson is able to deal directly with national governments and multilateral agencies and can provide “one-off” solutions to national and international development problems.

Additional research on the multinational corporation Pearson and its related subsidiary PALF has been undertaken by article by Curtis Reip who examines how, why, and with what consequences, corporate-led privatisations in Philippines education are taking shape, through an analysis of APEC (Affordable Private Education Centers). Government failure to provide quality education for all Filipino youth has resulted in commercial opportunities for private corporations to participate and help fill the “governance gap” through market-based service delivery. So-called ‘low fee’ private schools (LFPS) like the APEC in the Philippines are being sold to poor families on the promise that they appoint highly committed teachers and provide learning outcomes superior to public schools. Despite claiming to offer better schooling to poor households, LFPS schools often remain inaccessible to the poorest families, unable to afford the daily fees.

Research on such schools in other countries throughout the world (such as Kenya, Ghana, India, South Africa, Uganda, and elsewhere) indicates that they predominantly enrol children who were previously enrolled in other schools, rather than reach out to those who have never attended school. Fees may require up to 40 percent of household income per child from the poorest households. There is evidence that in some countries, poor households favour paying fees for boys rather than girls if choices have to be made.

In addition, the quality, affordability and equity-effects are highly contested. LFPS usually employ teachers who are unqualified, paid extremely low wages and employed on short-term contracts to drive down costs. Similarly, in order to increase profit, several schools operate a so-called ‘school in box’ model where teaching and learning are standardised. Despite claiming to target poor households, LFP schools often remain inaccessible to the poorest families, unable to afford the daily fees. Making matters worse, these schools may divert public funding and support for state-run schools, thus weakening public schools systems, particularly in contexts where government spending on education is already low.

Despite all the evidence showing that the application of market principles to the provision of education has a negative impact on students by deepening segregation and inequality, many governments are complicit in what amounts to a de facto dismantling of public education. EI and commissioned authors stand ready to play a full part in the campaign to roll back so called low-fee private schools and hidden costs to education in the global south where aid budgets from the global north are being plundered by the privateers to increase their profit and

simultaneously killing off any state-provided school systems.

El is now at the forefront of an anti-GERM, anti-privatisation campaign which seeks to challenge directly the edu-businesses that profit from our children. Since 2014, as result of work by El affiliates, a major campaign has been launched at global level. The Global Response to Edu-Business and the Commercialisation of Education is El's answer to the rapid expansion of for-profit activities in education around the world. The Global Response campaign has sought to engage parents, students and the wider school and education community in the struggle for an education system which is free, fair and inclusive for all.

We begin this special issue with an article by Angelo Garveilatos, Director of El's Global Response, explaining how El is responding to the growing threat against quality education for all by education corporations/edu-businesses, hoping to harness collective energy and influence to advocate against the expansion of profit-making in education. Through research, advocacy and creating alternative platforms El is putting the spotlight on education corporations and for-profit education/education services, while also working with governments to ensure every student has access to high quality free public education.

## Acknowledgements:

This Special Issue of Worlds of Education grew out of numerous conversations started during meetings of the Critical Friends Working Group at Education International, and reflects an important compilation of scholarly work produced by researchers and activists working with El on the Global Response.

I want to thank all of the authors who contributed to this Special Issue for their ongoing contributions to the Global Response and to El in general. The struggle to save and reimagine high quality public education in schools across the world continues, and a concerted and rigorous research response to corporate privatization is required.

Thanks also to the graduate students in New York University's International Education program: Alexandra Martinez, Jill Knapczyk, Katherine Vallario, and Kayla Sorin who organized, edited and compiled articles for this issue. I'm hoping this will be the beginning of building the next generation of scholar-activists through these forms of engagement with education organizations like El.

Finally, I want to thank educators and advocates of public schooling who, despite the risk of losing their jobs and sometimes their lives, continue the fight for public education. Their stories and challenges are told within these pages.

## ABOUT THE AUTHOR



Carol Anne Spreen

Carol Anne Spreen is a professor of International Education at New York University. Her policy and advocacy work focus on issues of education rights, school reform, and educational inequality both domestically and internationally. Her research is on issues of equity and social justice through rights-based advocacy and teaching in the US, Southern Africa, Latin America and the Caribbean. Over the last two decades she has served as a researcher for several progressive education reform centers: School Redesign Network (SRN), National

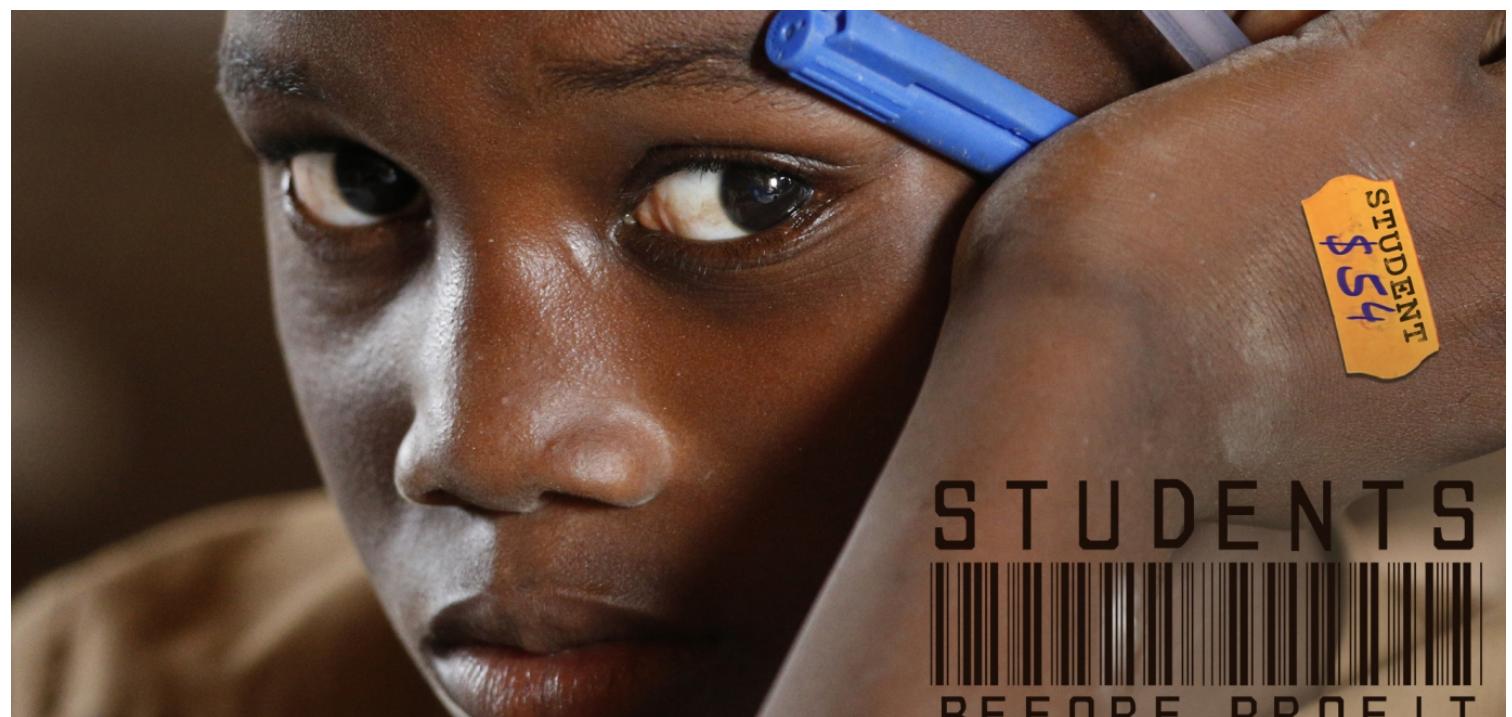
Center for Restructuring Education, Schools and Teaching (NCREST), Center for Research and Evaluation on Standards and Student Testing (CRESST), and North Central Regional Educational Laboratory (NCREL). Her current research focuses on teacher's lives and work, the impact of privatization and standardized testing on public education, and using participatory/action research to study the long term impact poverty in urban and rural communities on educational access and outcomes. She serves as a "Critical Friend" for Education International, the umbrella organization for the world's teacher unions and a Visiting Professor at the University of Johannesburg. Carol Anne has taught or worked across every level of education - from a bi-lingual kindergarten teacher in Pilsen neighborhood of Chicago, to university professor at the University of Maryland, the University of Virginia and the University of Witwatersrand in South Africa. She received her Ph.D. in Comparative and International Education in 2001 from Teachers College, Columbia University, M.Ed. in Instructional Leadership from the University of Illinois - Chicago and BA in International development and education from American University.

## CHALLENGES TO PUBLIC EDUCATION SYSTEMS GLOBALLY

A case for a response to privatisation attempts

By: Angelo Gavrielatos

Theme: Trade and Education



**The case for a Global Response to the Commercialisation and Privatisation of Education is not only clear, it is urgent.**

In the context of the many challenges that confront public education systems globally, the increasing commercialisation and privatisation in and of education represent the greatest threat to education as a public good and to equality in education access and outcomes. It should therefore not be of any surprise to anyone that the commercialisation and privatisation of education was one of the main issues, dominating the

proceedings, of the 7th World Congress of Education International (EI)<sup>i</sup>, which took place between 22-26 July in Ottawa, Canada.

Noting the dimension and the threat to students, teachers, education support personnel and quality public education for all, posed by the on-going commercialisation and privatisation of education, the World Congress, consisting of nearly 2,000 delegates from teacher unions throughout the world, resolved that we need a global response to the rapidly expanding for-profit corporate sector involvement in education. Whilst this carries on from EI's existing work on privatisation and member organisations' national campaigns focused on privatisation, the Global Response to the Commercialisation and Privatisation in and of Education aims to draw these efforts together to deliver a stronger more focused response by harnessing collective energy and influence.

The Global Response aims to put the spotlight on the engagement of education corporations<sup>ii</sup> in various aspects of education governance as well as the sale and provision of for-profit education and education services, such as standardised testing, curricula and teacher evaluation tools and support for the introduction and expansion of Low Fee For-Profit Schools. It seeks specifically to advocate against the expansion of profit-making in education where it undermines the right of all students to free quality education, creates and entrenches inequalities in education, undermines the working conditions and rights of teachers and other education workers, and erodes democratic decision-making and public accountability in relation to education governance.

This is informed by an analysis highlighting the rapid growth of education corporations/edu businesses—the size, reach and influence of which had not been foreseen. With little, if any regard for national borders and the nation state or national sovereignty, the swift growth of education corporations/edu-businesses is driven by the desire on the part of global capital to access the relatively untapped education market valued at approximately \$4.5 to \$5 trillion USD per annum. A figure predicted to grow to \$6 to \$7 trillion USD per annum in a couple of years.

Having identified the lucrative nature of the education market, and in particular how much the limitless, sustainable resource of children, our students, and their education represents, global education corporations/edu-businesses have set about trying to influence and control education in order to satisfy their profit motives.

<sup>i</sup> Education International (EI) is the Global Union Federation which represents more than 32 million teachers and other education workers from more than 170 countries.

<sup>ii</sup> Among the most influential corporations operating in the global education market is the education conglomerate Pearson. Through aggressive lobbying, campaign contributions and PR efforts, Pearson exerts great influence over policymaking and policymakers in many countries. Describing what could be interpreted as giving rise to a potential conflict of interest, research by Jünemann and Ball, Pearson and PALF: The Mutating Giant <http://www.educationincrisis.net/resources/ei-publications> highlights why the profit motive has no place in dictating what is taught, how it is taught, how it is assessed nor how schools, colleges and universities are organised.

Of Pearson's modus operandi, Jünemann and Ball note: "as Pearson is contributing to the global education policy debate, it is constructing the education policy problems that will then generate a market for its products and services in the form of the solutions. In effect, part of the more general aim of activities like the Pearson Affordable Learning Fund (PALF)...is the creation of more market opportunities for Pearson's products. More generally, global education reform packages which include the use of information technology and shifts from input-based to output-led policy-making, offer a whole new set of market opportunities to Pearson. Pearson is involved both in seeking to influence the education policy environment, the way that policy 'solutions' are conceived, and, at the same time, creating new market niches that its constantly adapting and transforming business can then address and respond to with new 'products'. In this sense, the fulfilment of social purpose is directly and indirectly related to the search for and creation of new opportunities for profit..." (p3)

## ABOUT THE AUTHOR



Angelo Gavrielatos

Angelo Gavrielatos is the Project Director at Educational International (EI) responsible for leading EI's response to the growing commercialisation and privatisation of education.

He was the Federal President of the Australian Education Union (AEU) for 7 years prior to commencing work with EI.

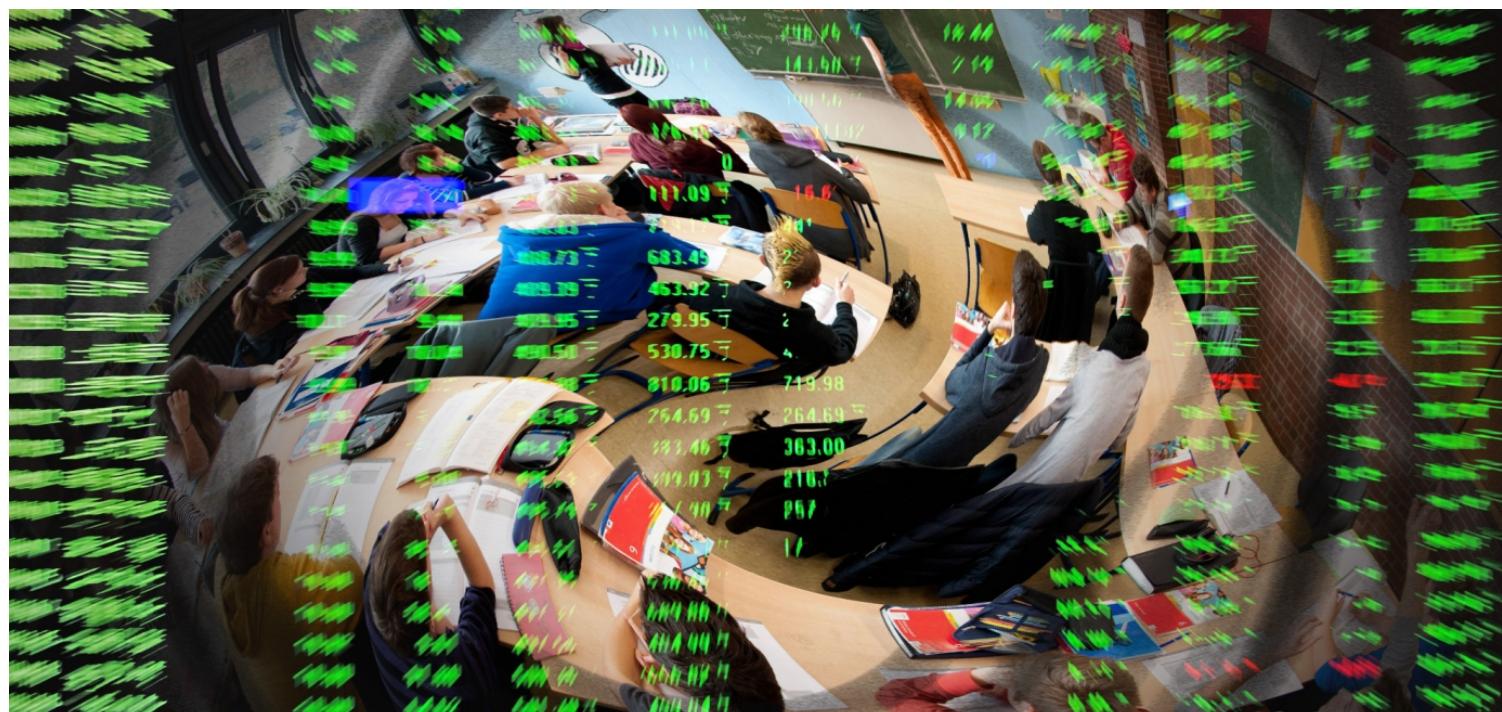
Angelo started his career in 1987 as a secondary teacher in South West Sydney, NSW.

## MARKET FUNDAMENTALISM DEFORMS EDUCATION

Market Fundamentalism Deforms Education

By:Steve Klees

Theme:Trade and Education



Capitalism became a global force centuries ago. But for most of its history, there was a struggle through which the inequalities and excesses that came along with it were tempered, at least partially, by government interventions. That led, in many countries, to about 50 years of the

welfare state, from the 1930s to the 1970s, in which government was seen as playing a major and legitimate role in reigning in capitalism. All that changed in the 1980s with the election of Thatcher in the U.K., Reagan in the U.S., and Kohl in Germany. Since then, neoliberalism has dominated, within which government is maligned and seen as illegitimate, and business and the market reign supreme. This has had enormous and harmful consequences for public policy, in general, and for education, in particular. Business, embedded in a market system, has been the driving force for education throughout the past 30+ years of the neoliberal era around the world. The global emphasis on business and the market system has distorted education in myriad ways, including:

## Mismatch

Even before the neoliberal era and continuing through to today, educational failures have been blamed on the mismatch with the needs of business. Unemployment, in particular, is put at education's door, arguing education is not teaching what the economy needs. It is, unfortunately, true that many children and youth leave schools without basic reading, writing, and social skills which are necessary for work and life. But the mismatch argument is usually not about basic skills but vocational skills. The mismatch argument, while superficially plausible, is not true for at least two reasons. First, vocational skills, which are context specific, are best taught on the job. Secondly, unemployment is not a worker supply problem but a structural problem of capitalism. There are three or more billion un- or under-employed people on this planet, not because they don't have the right skills, but because full employment is neither a feature nor a goal of capitalism.

## Entrepreneurship

Periodically, a solution to education and employment problems is posited to be teaching entrepreneurship. This was popular in development circles in the 1970s and 1980s, especially tied to the idea of connecting education to jobs in the informal sector in developing countries. In more recent decades, it emerged focused on rural women, often tied to microfinance, and sometimes more broadly seen as an essential part of the primary and secondary school curriculum in developing countries, again as a route to jobs in the informal sector. Most recently, university curricula in some developed countries have emphasized entrepreneurship to promote innovative employment. But all this is simply the same failed labor supply approach embedded in the mismatch argument. Moreover, this version is even more problematic. Instead of preparing people for existing jobs a la mismatch, entrepreneurship is preparing them for jobs that do not exist. Entrepreneurship is the result of our failure to make good on the promise of decent work and substitutes hope and prayer for effective economic policy that creates employment. Entrepreneurship is even being taught to teachers in some countries to enable them to find additional work – instead of improving abysmal levels of pay and working conditions.

## Human Capital Theory and Labor Economics

Tied to both issues above, capitalist economics in the 1950s, and earlier, had a problem understanding labor. While the economic framework was centered on supply and demand by individuals and small firms, at the time, labor economics was more sociological, dealing with institutions like unions and large firms, and phenomenon like strikes, collective bargaining, and public policy. The advent of human capital theory in the 1960s took the sociology out of labor economics and focused it on individuals and the supply of and the demand for workers, mostly on supply. Education was seen as investment in individual qualities that made one more productive and employable. This was operationalized by measuring rates of return (RORs) to different levels or types of education. Unfortunately, these RORs had no legitimacy for two reasons. First, in theory, they should have been

looking at much more than the impact of education on income, and, since they did not, the results were distorted. Second, they could not even accurately measure the impact of education on income since income is affected by dozens of variables and there is no correct way to control for them.

While ROR measures were faulty, nonetheless, in the abstract, there is some truth to this supply version of human capital theory. However, that truth is partial at best, and actually more empty than useful. That is, abilities like literacy, numeracy, teamwork, problem-solving, critical thinking, etc. can have a payoff in the job market but only in a context where such skills are valued. The more useful and important question is the demand-side one, too often ignored by human capital theorists, regarding how can we create decent jobs that require valuable skills. Under neoliberalism, government intervention, at best, furthers education and human capital formation. Government intervention for other purposes, like decent job creation, is considered anathema under neoliberalism; the market is supposed to take care of the demand side. We have seen how spectacularly unsuccessful reliance on the market has been for creating decent employment.

## Direct Investment

Business does not only influence educational discourses, as discussed above. Education itself has become big business. It is estimated that the private market for education could be worth trillions of dollars billion worldwide. Private schooling continues to be a significant part of primary and secondary schooling around the world and, in the neoliberal era, an ever more significant part of post-secondary education. Organizations like the International Finance Corporation (IFC), part of the World Bank Group, while created in 1956 to invest in private companies in developing countries, grew precipitously in the neoliberal era. Education was initially a small area of investment but has grown to where the IFC in 2012 had over \$850 million in commitments. Direct foreign investment in education has also been promoted by the World Trade Organization's (WTO) General Agreement on Trade in Services (GATS). GATS encourages countries to open their economies to foreign investment in education (and other services), raising questions of accountability, control, and sovereignty.

## Privatization

Direct private investment in education did not begin under neoliberalism but was greatly facilitated by it. As said above, neoliberalism brought an ideology that deprecated government and exalted the private sector. The privatization of public services was encouraged and, in education, private schools, vouchers, charters, user fees, and the like were recommended as solutions to problems of educational quality and even educational inequality. This marketing of privatization was pure ideology. There was only trumped-up evidence that these approaches improved some narrow version of educational quality and there was overwhelming evidence that they exacerbated inequalities. Moreover, the recognition of education as a public good, that had been so strong in the 1960s and 1970s, got short shrift in discussions of education policy after that. Privatization is a strategy of triage – perhaps, at best, sometimes improving education for a few and selling out the right to quality public education for all.

## Public-Private Partnerships (PPPs)

An outgrowth of this neoliberal obsession with the market and its promotion of privatization are PPPs, which come along with a belief in the need for increased corporate philanthropy in education and other sectors. The argument is that the know-how and resources of business, on its own or in partnership with government, can be applied to improving education. This follows directly from neoliberal ideology, made more salient by the vast shortfall of public resources to achieve Education for All (EFA), the Millennium Development Goals (MDG), and now, the Sustainable Development Goals (SDG). However, business has little to offer education as a recent Brookings Institution study of U.S. corporate philanthropy and PPPs made clear; the resources offered were "small change," and efforts were self-interested, uncoordinated, small in scale, and misdirected. I had a business school professor who once wrote a paper entitled, "The Social Responsibility of Business and Other Pollutants of the Air." He was very pro-business; his point was that the business of business was business, and

we shouldn't want or expect them to help solve problems that are fundamentally government's. PPPs are pushed by companies like Pearson who stand to make substantial profits off government expenditures on education. PPPs exist mostly because of neoliberalism's abrogation of responsibility by government for the social welfare, in general, and education, in particular.

## Business Approaches to Education

As part of privatization ideology and the promotion of PPPs, ideas from business and business leaders have been marketed as important to the improvement of education. Sometimes this entire business-oriented approach is subsumed under the heading of "new public management." This is ubiquitous and has given most educators a lot of headaches. Right-wing think tanks and foundations (I include the World Bank here) have proliferated, offering neoliberal educational advice and steering educational policy. Primary, secondary, and higher education have suffered from the call for business plans, strategic plans, performance budgets, right-sizing, impact evaluation, merit pay, and the like. Evaluations of teachers have multiplied, usually illegitimately tied to a few very narrow indicators. School district superintendents and university presidents are now called chief executive officers, and too often are selected with a business background instead of an education one. And, most common, is that task forces and commissions on education routinely give pride of place to business executives, as if business strategies translate to education strategies. This is quite visible globally, to take one of many examples, in the World Economic Forum's task force on education. They have been a major voice in global education reform such as the post-2015 discussions.

## Post-2015 Directions

EFA targets and the MDGs have not been met in 2015, as they were supposed to have been. Instead, the United Nations has kicked the can down the road to 2030, approving the SDGs which repeat the old goals and add new ones to be supposedly attained over the next 15 years. The goals are laudable but there is no reason to believe that we will be any more successful this time around than we have been in the past. To achieve the education SDG, it is estimated that we will need at least 80 times the amount of money annually that Global Partnership for Education has managed to cobble together. It could be argued that, despite good intentions, EFA and the MDGs were not serious efforts. Instead, they were there to legitimate a fundamentally unfair system by promising education and social improvement but delivering little.

Engaging post-2015 goals while neoliberalism operates business as usual will not get us very far. We have endured 30+ years of a Great Experiment. With no evidence whatsoever, government was attacked and, in many ways, dismantled, and business and the market were put forth as saviors. However, in education and elsewhere, the results of this Great Experiment have been dismal. It is time to end this experiment with neoliberal capitalism. Whether this means trying to move beyond capitalism entirely or whether it means the development of a new kind of welfare state is worth discussion. What it certainly means is to re-establish the legitimacy of government. What needs to be front and center is the call for a large, vibrant public sector that puts limits on the market, that promotes and creates decent employment, that provides for the production of public goods, that develops an adequate and fair system of taxation, that redistributes wealth, not just income, and that is run as a very participatory democracy.

## ABOUT THE AUTHOR



Steve Klees

Steven J. Klees (sklees@umd.edu) is the R. W. Benjamin Professor of International and Comparative Education at the University of Maryland. He did his Ph.D. at Stanford University and has taught at Cornell University, Stanford University, Florida State University, and the Federal University of Rio Grande do Norte in Brazil. Prof. Klees' work examines the political economy of education and development with specific research interests in globalization, neoliberalism, and education; the role of aid agencies; education, human rights, and social justice; the education of disadvantaged populations; the role of class, gender, and race in reproducing and challenging educational and social inequality; and alternative approaches to education and development.

## WHEN PRIVATE INTERESTS INTO PUBLIC EDUCATION SIMPLY DO NOT GO

The Long Division

By: Susan Robertson

Theme: Trade and Education



In 2014, French economist, Thomas Piketty – made the best-seller list in the popular media with his weighty book, *Capital in the Twenty First Century*. It is not often that an academic text like this can be picked up as 'essential' reading in airport bookshops.

What was it about Piketty's extraordinary overnight success? In part it was because this was an economist breaking ranks with fellow neoclassical economists whose ideas have, since the 1980s, shaped political projects and agendas around the world. Drawing on the works of Adam Smith, they argued a free market would lead to greater wealth production and that this in turn would trickle down, leading to all boats rising.

However, Piketty's work shows precisely the opposite. And he is not alone in drawing this conclusion. The

OECD in 2014 published work that confirms Piketty's analysis. Not only has wealth trickled upward, but huge wealth is now concentrated in a tiny percentage – the 1% - whilst the middle and working classes have lost considerable ground in terms of their share of wealth.

What characterises the most unequal? They all embraced neoliberal policies from the 1980s onward. From being a relatively more equal society in the 1970s, the USA is now more unequal in the distribution of wealth and income than at any point over the past century. This also is the case for the UK, Portugal and Spain.

Nobel Laureate, Joseph Stiglitz, former chief economist of the World Bank, recently described the policy mix as a complete failure in that it has produced a more unequal society. Similarly Paul Krugman – also a Nobel Laureate of economics, shows that each time in the USA there have been tax cuts for the rich, this has led to a decline in economic productivity. When the top tax rates were increased, this led to economic growth.

Yet since the 1980s, many governments around the world have adopted this market-based/ privatisation agenda. And education has not exempted from this. What countries are committing themselves to is a particular logic: that education will be more efficient if it operates according to the rules of competition (choice, standards, information about performance, and so on leading to better quality) and that private firms will deliver goods and services more efficiently than governments (leading to cost savings). Typical mechanisms to deliver this market-based model include vouchers, charter schools, academies, free schools, market-based teaching, or test-based accountability. The assumption driving this model is that private management (if not ownership), with few regulations, will deliver better learning outcomes.

Now the problem with this model (for example, of no or low levels of taxation for the wealthy, tolerance of tax havens, tax breaks for non-domicile residents, tax breaks for foundations), is that public education is as it says on the box: public, and dependent upon state redistribution. When those earning and owning the most do not pay their share of tax, then either the state spends more than it receives – hence borrowing more to pay the bill, or letting more and more of the tax burden fall to middle and working class families, with those least able to, shouldering a bigger share of tax relative to income and outgoings.

The market model has also been promoted by private interests who see that they can make a profit from delivering education services – either as managers and providers of schools, or in testing and other key services. Yet the temptation to exclude particularly kinds of children because their results on tests are likely to be lower, or to choose those students who are expected to be high performers, also means public education becomes not so much 'public education', but a sector that can be exploited for private gain.

The market model can be contrasted with a public investment model; a comprehensive education system premised on universal access, the preparation of citizens for the economic and wider political society, and equality. The mechanisms to ensure quality include the preparation of high quality teachers, equitable funding to schools, high quality infrastructures, and whole child pedagogy. The drivers of outcomes are that public ownership, public responsibility, and accountability through democratic processes will ensure better quality teaching and learning environments for teachers and students and thus better learning outcomes. In the strong state-public investment model the state is able to draw upon a progressive taxation system in order to invest in the public interest, rather than depending upon families to find the resources for the own individual, inevitably unequal, investments.

So what evidence might we look at that would enable us to see that the difference between ideology and evidence regarding which governance model for delivering socially-just education? Can we do the sums, and what do they add up to? In a forthcoming book on the issue, academics, Frank Adamson, Bjorn Astrand and Linda Darling-Hammond demonstrate the differences between a weak state-market model, and a strong-state public investment model. Pairing Sweden with Finland, Chile with Cuba, the USA with Ontario they draw a series of conclusions about each model. The evidence is quite stark.

They show that when we do the sums and add up the evidence, no country is able to show notably better results arising from a market investment model. Rather, over time, deep-seated inequalities begin to reveal themselves in such a way the entire system suffers. This reality has led Stanford education economist, Martin

Carnoy to argue that the negative aspects of inequality and markets, especially as they play out at the bottom of the social scale, seem to offset any positive effects of parent's freedom to pick and choose among schools".

Similarly, those US states with the highest overall performance have been least involved in chartering or privatisation, while those with unregulated market based reforms perform worst overall.

One question we might ask here is why? What are the dynamics at work? Professor Marius Busemayer and colleagues at Konstanz University, Germany, give us some of the answer. They argue that if elites favour private education because of the benefits that are derived, and if low income groups prefer more socialised systems because of the benefits a public system will bring, much then depends on whether there is an easy opt-out clause, or opt-in incentives for the middle classes regarding a state investment model versus a market model. The middle classes are more likely to pursue a state investment model if they can valorise some advantage here. But this has benefits for the working classes in that the middle class is likely to work politically hard for better public education, and in this case, there is a trickle-down effect (assuming no systems of tracking are put into place) because a diverse school mix works best for those with fewer resources.

It is clear private interests into public education simply do not go! And the sums are not that difficult to calculate. This is a question of political will – as the evidence is increasingly compelling that market models are divisive and dividing. An education system committed to a public investment model and not a private market model would not only have a radical effect on politics, but it will lead to greater levels of economic productivity and social equality, and not more for a tiny elite. And that is definitely something worth struggling for!

## ABOUT THE AUTHOR



Susan Robertson

Susan Robertson is Professor of Sociology of Education at the University of Bristol. Her research is concerned with the changing nature of education as a result of transformations in the wider global, regional and local economies and societies, and the changing scales on which ideas, power and politics are negotiated. She is particularly interested in how these dynamics challenge, and change, the nature and scope of education outcomes and the social justice implications of these for different social groups – including students and teachers. Her recent books include: *Public Private Partnerships in Education* with Karen Mundy, Anthony Verger and Francine Menashy (published by Edward Elgar), and *Privatisation, Education and Social Justice* with Ian Macpherson and Geoffrey Walford (published by Symposium Books).

## HIDDEN PRIVATISATION IN PUBLIC EDUCATION

A summary of recent findings

By:Stephen Ball

Theme:Trade and Education



**The growing tendency amongst governments to introduce forms of privatisation into public education and to move to privatise sections of public education are having major influence, on public education systems in countries across the globe. A range of policy tendencies that can be understood as forms of privatisation are evident in the education policies of diverse national governments and international bodies. Some of these forms are named as privatisation but in many cases privatisation remains hidden as an effect or means of educational reform.**

In some instances forms of privatisation are pursued explicitly as effective solutions to the perceived inadequacies of public service education. However, in many cases the stated goals of policy are articulated in terms of 'choice', 'accountability', 'school improvement', 'devolution', 'contestability' or 'effectiveness'. Such policies often are not articulated in terms of privatisation but nonetheless draw on techniques and values from the private sector, introduce private sector participation and have the effect of making public education more like a business.

It is not simply education and education services that are subject to forms of privatisation: education policy itself – through advice, consultation, research, evaluations and forms of influence – are being privatised. Private sector organisations and NGOs are increasingly involved in both policy formation and policy implementation.

Privatisation can be understood as being comprised of two key types:

1. Privatisation in Public Education or 'endogenous' privatisation

These forms of privatisation involve the importing of ideas, techniques and practices from the private sector in order to make the public sector more like businesses and more business-like.

2. Privatisation of Public Education or 'exogenous' privatisation

These forms of privatisation involve the opening up of public education services to private sector participation on a for-profit basis and using the private sector to design, manage or deliver aspects of public education.

The first form of privatisation, where the public sector is asked to behave more like the private sector, is widespread and well established. The second form of privatisation, where the private sector moves into public education, is a newer but rapidly growing form of privatisation. These forms of privatisation are not mutually-exclusive and are often inter-related, indeed, exogenous privatisation is often made possible by prior endogenous forms.

Both privatisation in public education and privatisation of public education often remain hidden and are not subjected to public debate – in the first case techniques and practices are not named as privatisation, in the second case privatisation is not publicly known about or properly understood.

These various forms of privatisation change the way in which education is organised, managed and delivered; how the curriculum is decided and taught; how students' performance is assessed; and how students, teachers, schools and communities are judged. These forms touch every part of what shapes the education system. They are at the centre of the shift from education being seen as a public good that serves the whole community, to education being seen as a positional or private good that serves the interest of the educated individual, the employer and the economy.

## **Schools being business-like or like-businesses: 'endogenous' privatisation**

The 'market form' is the key device of hidden privatisation in education. The development of what are often known in the critical literature as quasi-markets rests primarily upon the introduction into the state education system of forms of school choice – the right of parents to choose between schools.

Choice is facilitated by moves to diversify local education provision alongside the removal or weakening of bureaucratic controls over school recruitment, school funding tied to this recruitment, and support for and encouragement for choice and of movement around the system. An outcome that policy makers seek from these moves is the production of competition between schools, competition that is expected to have the effect of raising standards across the system; either through the closing down of 'poor' schools which fail to attract sufficient parental choices or by raising the performance of these 'poor' schools as a result of the competition for choices.

Education markets are not in any simple sense 'free markets', rather they are subject to considerable regulation, direction and involvement by the state. In these circumstances the state acts to set system targets and benchmarks, monitor and record performance and write and award services contracts rather than deliver education services.

Key features of hidden privatisation in making the public school system more business-like are the rise of New Public Management (NPM) and the role of the school manager. The manager is a new actor on the stage of public sector organisations and is the central figure in the reform of the public sector and the introduction of quasi-markets. The term 'educational management' began to be used in the 1970s, and brought with it a set of methods, ideals and concepts (objectives planning, human resources, performance monitoring, and accountability) from the private sector. The manager is a key agent of organisational change and a cipher for privatisation policies. Significant education policy shifts from the 1980s on gave managers devolved powers to control their organisational budgets, their workforce (pay and recruitment) and internal decision-making in innovative and creative ways to achieve the goals and purposes of education reform. The purpose of such devolution, as the OECD put it, 'is to encourage managers to focus on results by providing them with flexibility and autonomy in the use of both financial and human resources' (1995, p. 8). NPM has been the primary means through which the structure and culture of public services are recast in order to introduce and entrench the mechanisms of the market form and forms of privatisation. In doing so it affects how and where social policy choices are made and systematically side-lines and disempowers educational practitioners. It also increasingly subjects them to new forms of control through performance management techniques.

Accountability and performance management mechanisms, sometimes including performance-related pay, are

again techniques of reform which were transferred into the public sector from business but these origins are now no longer acknowledged. These techniques are intended to ensure that educational processes are made more transparent but can also have powerful effects in re-orienting the work of schools and teachers and changing the values and priorities of school and classroom activities.

## Bringing the Private Sector into Schools: 'exogenous' privatisation

The participation of the private sector in the delivery of public education is growing internationally. The private sector and NGOs have long been involved in the delivery of education in parts of the developing world where full state-funded education has not been established. These providers have also long delivered elite, religious and other alternative forms of education in western industrialised nations. Yet the possibility of the public education sector as a site for significant profit-making has emerged only recently, often as an offshoot from or development of the sorts of often hidden forms of privatisation in public education detailed in the previous section.

This private sector participation ranges from multi-million dollar building projects (Public Private Partnerships) and national contracts for systems management and testing to involvement in the small-scale, everyday activities of schools and with teachers. For example, the recent introduction of a system of National Testing in Japan was contracted out to two companies NTT Data and Benesse (Japan's largest private provider of after-school and child care services) – eight companies submitted bids for the tender which involved the printing, delivery, marking, statistical analysis of the tests and provision of results to local authorities. In the USA many school districts now contract-out their assessment and student testing, data management, remedial services and subject –specific curriculum development work. Whiteboards are increasingly common in classrooms around the work and bring with them the use of commercial teaching software and training provided by the board companies.

In the education sector, governments have historically made considerable use of contracting for 'non-core' educational services. However, there are now a number of examples of governments in countries as diverse as the United States, the Philippines, Colombia, New Zealand and the United Kingdom contracting directly with the private sector for the delivery of 'core' education services. In many countries this practice is now so normal that it provokes little or no public comment. Not only contracting out services but contracting out schools have become part of this exogenous privatization. Individual state schools or groups of schools have been handed over to private companies to run under contract on a 'for profit' basis. Here private providers are regarded as being able to provide a better quality of education service than municipal schools, although this is not always the case in practice.

Public Private Partnerships (PPP) involve the use of private providers to design, build, operate and manage and state education facilities on a lease-back basis. This transfers capital costs and some risk to the private sector. It also commits governments or local authorities to long- term lease repayments. This practice is advocated by the World Bank. There is now a thriving secondary market in PPP contracts. There are varying levels of public awareness and understanding of these partnerships and their implications.

## Conclusion

The tendencies outlined and more are not just technical changes in the way in which education is delivered. They provide a new language, a new set of incentives and disciplines and a new set of roles, positions and identities within which what it means to be a teacher, student/learner, parent etc. are all changed.

Privatization in both forms, endogenous and exogenous, has profound implications for the future of teachers' careers, pay and status, and the nature of their work and their degree of control over the educational process. Privatisation challenges the capacities of teachers' Trade Unions to bargain collectively on behalf of their members, secure favourable, single agreements with employers and more generally participate in the

education policy landscape. It also changes the work of teachers in many areas: how teachers are prepared; the nature of and access to ongoing professional development; the terms and conditions of teachers' contracts and pay; the nature of teachers' day-to-day activities and the way they experience their working lives. The 'flexibilisation' of teachers work is a key component of most versions of privatisation and this threatens to alter both the perception of teachers within society and the quality of students' experience in schools.

Privatisation in and of public education has its roots in the sorts of 'small state-free market' approaches to public services, what is sometimes called 'neo-liberalism', that have been evident in a wide variety of national contexts since the 1980s and which are now widespread internationally. In many developing nations privatisation tendencies are most prominent in newly established, often World Bank or Aid funded, special education projects.

Privatisation works as a policy tool in a number of ways, with a variety of ends and purposes. It is not a giving up by the state of capacity to manage social problems and respond to social needs but a new modality of state action. The privatisation of education and social welfare involves a shift in the role of the state from that of delivering education services directly, to that of contractor, monitor and evaluator of services delivered by a range of providers.

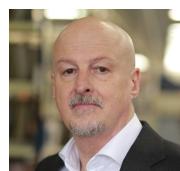
Market forms, competition, choice and a focus on performance management all carry with them ethical dangers and many examples of opportunistic and tactical behaviours are already apparent in schools and among parents within such systems. For the teacher competitive relations often produce ethical dilemmas between the interests of the institution and those of students. All of this is indicative of a general moral pauperisation of the moral sphere. These market forms can also have a significant impact on equity in education, not just in widening gaps between the privileged and the disadvantaged, but also in changing how equity and social justice in education are understood.

Policy and practice at country-level are changing extremely rapidly which means that accounts of the policy situation cannot be definitive but rather must be understood as snapshots at particular moments and responses to policy must be able to take account of this rapidly changing terrain.

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## ABOUT THE AUTHOR



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# BLENDED LEARNING IS THE NEXT ED TECH REVOLUTION

Hype, Harm and Hope

By: Phillip McRae

Theme: Trade and Education



**"The great enemy of the truth is very often not the lie – deliberate, contrived, and dishonest – but the myth – persistent, persuasive, and unrealistic." ~ John F. Kennedy**

Blended learning, where students' face-to-face education is blended with Internet resources or online courses, has been gaining considerable attention in education reform circles. It has become entangled with the ambiguous notion of personalized learning and is being positioned as the new way to individualize learning in competency-based education systems.

Michael Horn, co-founder of the Clayton Christensen Institute for Disruptive Innovation, and a key proponent of blended learning, claims that it is the "new model that is student-centric, highly personalized for each learner, and more productive, as it delivers dramatically better results at the same or lower cost" (Horn and Staker 2011, 13).

To what extent is this a new model of learning in a digital age? How are private corporations employing old rhetoric to advance new avenues into public education? Most importantly, is blended learning becoming yet another overhyped myth on the crowded road of technology-as-education-reform panacea?

## ORIGINS OF A MYTH

Students blending the use of technology with face-to-face instruction as a means of collaborating and extending their learning experiences is not unusual, revolutionary or foreign to the average Canadian

classroom. As a concept, blended learning is now almost two decades old, having been imported into K–12 education in the late 1990s from corporate education, business training firms and the post-secondary education sector. Although the precise origin is unclear, it has been suggested that an Atlanta-based computer training business coined the term in 1999 (Friesen 2012), as it announced the release of a new generation of online courses for adults that were to be blended with live instruction.

Many blended learning practices already fit well with a vast array of hybrid face-to-face and digital experiences that students encounter in K–12 schools, including distributed learning, distance learning, or e-learning. Dr. Norm Friesen, a key academic in this area, suggests that blended learning “designates the range of possibilities presented by combining Internet and digital media with established classroom forms that require the physical co-presence of teacher and students” (Friesen 2012). As this broad definition illustrates, it would be difficult to find any use of technology in education that does not easily fit into this boundary.

Despite this fluidity of meaning, different models of blended learning have taken shape. In particular, Staker and Horn (2012) have attempted to classify blended learning environments into four models: rotation, flex, self-blend and enriched virtual. These four combinations range from those that are more connected to people and brick-and-mortar buildings (rotation, flex) to contexts in which the students are primarily self-directed through online courses or platforms that “deliver” the curriculum (self-blend and enriched virtual). In the more self-directed models, teachers or non-certificated facilitators are conditional and only scheduled for support as deemed necessary.

Although many models have been implemented over the last 20 years, there is scant evidence of the success of blended learning. Out of 46 robust research studies conducted between 1996 and 2008, only five have focused on results for students in K–12 settings (Murphy et al. 2014). As a recent article in Education Week illustrates, when looking for strong evidence of success around this strategy for K–12 students, very little “definitive evidence” or few significant results can be directly attributed to blended learning (Sparks 2015).

## HYPE

The current hype around blended learning models, especially in the United States, is that they bring to life personalized learning for each and every child. Personalized learning, as promoted under a new canopy of blended learning, is neither a pedagogic theory nor a coherent set of learning approaches, regardless of the proposed models. In fact, personalized learning is an idea struggling for an identity (McRae 2014, 2010). A description of personalization that’s tightly linked to technology-mediated individualization “anywhere, anytime” is premised on archaic ideas of teaching machines imagined early in the 20th century (McRae 2013).

Some blended learning rhetoric suggests that personalization is to be achieved through individualized self-paced computer programs (known as adaptive learning systems), combined with small-group instruction for students who have the most pressing academic needs. For those looking to specifically advance blended learning in times of severe economic constraints, a certificated teacher is optional.

Software companies selling their adaptive learning products boldly state that the “best personalized learning programs will give students millions of potential pathways to follow through curricula and end up with the desired result – true comprehension” (Green 2013). This is part of the myth of blended learning and is marketed using superficial math and reading software programs (adaptive learning systems) that make dubious claims of driving up scores on high-stakes tests. Corporate attempts to “standardize personalization” in this way are both ironic and absurd.

These adaptive learning systems (the new teaching machines) do not build more resilient, creative, entrepreneurial or empathetic citizens through their individualized, standardized, linear and mechanical software algorithms. On the contrary, they diminish the many opportunities for human relationships to flourish, which is a hallmark of high-quality learning environments.

One of the blended learning examples that has received perhaps the greatest attention is the “flipped classroom.” It is so named because it inverts classroom instruction during the day, so that students watch online video of lectures at home at their own pace, perhaps communicating with peers and teachers via online discussions in the evening, and spend their days doing homework in the classroom. Think of the popular media hype and mythical cure for math challenges sold to the public by the Khan Academy. There is nothing revolutionary or deeply engaging about pure lecture as a pedagogy, yet apparently adding hours of digitally distributed video each evening to a child’s life makes it so. In fact, research suggests that the use of this type of lecture recorded technology, as a primary approach to learning, can result in students falling behind in the curriculum (Gosper et al. 2008).

Many myths, when viewed up close, provide deep reflections of ourselves and society. Technologies in particular have amplified our North American desires for choice, flexibility and individualization, so it’s easy to be seduced by a vision of blended learning environments delivering only what we want, when and how we want it customized.

The marketing mantra from corporations as diverse as media conglomerates to banks is that of services at any time, in any place or at any pace. Many governments have in turn adopted this in an eagerness to reduce costs with businesslike customization and streamlined workforce productivity, all with the expectation that a flexible and blended education system will be more efficient and (cost) effective.

In the mythical space of blended learning, class sizes apparently no longer matter and new staffing patterns begin to emerge. The amount of time students spend in schools becomes irrelevant as brick-and-mortar structures fade away. However, this myth disregards the overwhelming parental desire and societal expectation that children and youth will gather together to learn in highly relational settings with knowledgeable and mindful professionals (teachers) who understand both the art and science of learning. As John F. Kennedy (1962) so eloquently stated: “The great enemy of the truth is very often not the lie – deliberate, contrived, and dishonest – but the myth – persistent, persuasive, and unrealistic.”

The U.S. Department of Education (2013) has clearly articulated a commitment to making blended learning come to life through nebulous ideas of competency-based systems and personalized learning.

“Transitioning away from seat time, in favor of a structure that creates flexibility, allows students to progress as they demonstrate mastery of academic content, regardless of time, place, or pace of learning. By enabling students to master skills at their own pace, competency-based learning systems help to save both time and money ... make better use of technology, support new staffing patterns that utilize teacher skills and interests differently ... Each of these presents an opportunity to achieve greater efficiency and increase productivity.”/

The cost efficiency and effectiveness rhetoric must be given special attention as part of the myth of blended learning in competency based systems./

## HARM

Schools and classrooms across North America are being subjected to economic volatility and severe constraints by reduced public education funding. Blended learning can be positioned as the vehicle to bring in third-party education providers to wipe out the expectations of small class sizes and certificated teachers in traditional classrooms. This idea is gaining momentum through a variety of U.S. virtual and charter schools that are radically reducing the numbers of teachers and executing increased class sizes under the banner of blended learning. As Michael Horn states when asked to give expert advice on blended learning models, “budget cuts and teacher shortages are an opportunity, not a threat” (Horn et al. 2014).

As school jurisdictions across the U.S. turn to online learning and blended models as a way to reallocate resources, the private providers are also advocating for “eradicating rules that restrict class size and student-teacher ratios” (Horn and Staker 2011, 13). To achieve this means lifting the rules around teacher certification

so that schools can replace teachers at will with para-professionals or noncertified individual learning specialists. As Christensen and Horn (2008) suggest, "Computer-based learning on a large scale is also less expensive than the current labor intensive system and could solve the financial dilemmas facing public schools" (13).

To enable this in an education system, several policies must be enshrined by governments that would allow private schools, virtual cyber-charter schools or educational technology companies direct access to students outside of a protected public system. The first is to open up multiple pathways of learning, which are more flexible in terms of time and space, and designed around technology solutions that only the company can deliver.

The Software & Information Industry Association, the principal trade association for the software and digital content industries in America, is a clear backer of redefining and expanding the role of the teacher, and advocates that "teacher contracts and other regulatory constraints may also need to be addressed to provide the flexibility in a teacher's role needed to make this dramatic shift in instruction" (Wolf 2010, 15).

On the surface, this flexibility sounds promising, as teachers and school leaders certainly recognize that the industrial model of command and control does not fit with our hyper-connected world. Yet the flexibility of any-time, any-place learning is manifesting itself in the U.S. around adaptive learning software programs or mandatory online learning courses that are being delivered by private companies. New course access legislation (as found in Wisconsin, Texas, Utah, Florida, Michigan and Minnesota) now allows anyone to teach online courses to students regardless of jurisdiction, certification or geographic location (Dwinal 2015). In other words, every course, for every student, anywhere, anytime – and now – taught by anyone. Half the teachers, but sold as twice the fun?

In the case of K12 Inc., the United States' largest private for-profit provider of online education for grades K–12, student-teacher ratios are as high as one teacher to 275 students (Aaronson and O'Connor 2012). As the president and CEO at McGraw-Hill Education affirms: "With this new method and capability, all of a sudden you could see a teacher handling many more students ... the productivity could double or triple" (Olster 2013).

The harsh reality, however, is that private online schooling is not about new blended learning models, flexibility or choice, it is about profit through the constant cycle of enrolment and withdrawal of students known as the "churn rate" (Gibson and Clements 2013). In contrast, our current publicly funded and publicly delivered online schools across Alberta reinforce the important role of certificated teachers as compassionate and empathetic architects of learning who work relentlessly to reduce the drop-out rates and increase student engagement in virtual learning environments.

Rocketship Education, one of the many rapidly growing charter schools out of the U.S., has adopted a rotation model of blended learning known as the Rocketship Hybrid School Model for kindergarten to Grade 5 students. It combines online learning on campus with traditional classroom-based activities in order to save \$500,000 per charter school per year in teacher salary costs (Danner 2010).

To accomplish this, Rocketship Education has cut half its teachers, changed its scope of practice and hired low-paid adults to supervise and monitor students in computer labs. The new staffing patterns within this rotation blended learning model place the schools in a one to 100-plus student/teacher ratio, with one or two low-wage computer lab monitors. These support personnel are endowed with titles like "individual learning specialists," "coaches" or "facilitators" (Public Broadcasting Service 2012).

Without certificated teachers present, there is a need to gather data on student performance, so the children spend a great deal of time in a computer lab with an adaptive learning program monitoring their every interaction. John Danner, former CEO of Rocketship Charter Schools and a former board member of DreamBox Learning Inc., promotes increased screen time during the day for children. He thinks that as the quality of software improves, "Rocketeers' could spend as much as 50 per cent of the school day with computers" (Strauss 2013). How many hours of development, in the minds and bodies of children and youth, are we willing

to sacrifice for more individualized computer-human interactions under the guise of blended learning?

If blended learning through the rotation model is to be defined by reducing the number of certificated teachers in schools and placing students in computer labs to spend half of their day in front of math and reading software programs, then education in the 21st century is indeed heading down an antiquated and very dangerous path. This is not historically the way blended learning has come alive in Alberta classrooms, nor should it be our preferred future.

## HOPE

The growth of digital media and the Internet has led to an explosion of resources and opportunities for teachers, students and learning communities. A constant shift is occurring with different mobile apps, blogs, video podcasts, social media tools, e-learning courses, or learning management systems in schools that all promise to help teachers create and organize student work, provide (real-time) feedback or communicate more efficiently.

With the proliferation of digital tools in our lives, many K-12 students now experience learning through a blend of face-to-face and digital or online media and are able to access new ideas and resources where student attitudes and engagement towards their education can be positively supported. If blended learning is to lead to positive outcomes for students, then it must be highly relational, active and inquiry oriented (both online and offline), and commit to empowering students with digital tools.

If done right, blended learning can be used to support more equitable access to learning resources and discipline-specific expertise. It may also engage students (and teachers) in a variety of online and offline learning activities that differentiate instruction and bring greater diversity to the learning context. Improving communication between teachers, students and parents and extending relationships across boundaries and time may also be an outcome of blended learning. It may also hold value by employing certain technologies that help teachers and students to formatively assess learning.

To make this truly hopeful, school-based technology infrastructure must be robust and up-to-date, with equitable access, and the necessary resources (human and technology) must be made available to pedagogically support the blending. It is not tenable if Internet connectivity is unreliable or limited, or if there exists inequitable access to bandwidth or technology infrastructure in the school and home. Finally, if technical glitches are pervasive, or if dependable technical support is not available for students and teachers, then it is unlikely that blended learning will be a sustainable concept.

## CONCLUSION

Blended learning is not a new term nor a revolutionary concept for classrooms in this second decade of the 21st century. However, the way it is being (re)interpreted could be hopeful or harmful depending on how it is implemented. It is an increasingly ambiguous and vague notion that is growing in popularity as many groups try to claim the space and establish the models, despite a lack of evidence and research. We should therefore be skeptical around the mythos of blended learning before endorsing or lauding it as the next great reform.

Blended learning has occupied a place in discourses of educational change for well over a decade, but it cannot be co-opted into a movement that displaces the human dimension of learning with an economic imperative to reduce labour costs by cutting the teaching population in half. Of particular concern in times of severe economic restraint is that high schools may become the testing ground for policymakers looking at ways to redesign by cutting certificated teachers in favour of massive online cohorts of students tutored by "facilitators" or "individual learning specialists."

Technologies should be employed to help students become empowered citizens rather than passive

consumers. Innovations are needed in education that will help to create a society where people can flourish within culturally rich, informed, democratic, digitally connected and diverse communities. We should not descend into a culture of individualism through technology where our students are fragmented by continuous partial attention.

For the vast majority of students within Alberta's K-12 public education system, we must achieve a more nuanced balance that combines both digital technologies and the physical presence of a caring, knowledgeable and pedagogically thoughtful teacher. This is not an optional "nice to have," but a "must have" if children and youth are to build resilience for the future. Blended learning may be (re)shaped by privatization myths, with adaptive learning systems as their voice, but in Alberta, our teachers still remain the quintessence of the human enterprise of paying it forward for our next generation. It is time for Alberta teachers to claim the space of blended learning and push back at the myths and questionable rhetoric.

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## REFORMS AND TEACHERS

Emerging policies, controversies and issues in developing contexts

By:Antoni Verger

Theme:Trade and Education



A recently published book aims at understanding, from an empirically grounded perspective, the nature, scope and dimensions of the new global trend of managerial education reforms and, specifically, how these types of reforms relate to teachers. All chapters are grounded on original research and primary data, the different case studies included here analyse reforms aimed at introducing teacher evaluation (Peru) and teacher accountability measures (Indonesia and Jamaica), competency-based curriculum (Turkey), public private partnerships (Uganda), contract teachers (India) and decentralisation (Namibia). They specifically focus on how these reforms

Over the last decades, a global movement of education reform has transformed education systems worldwide (Salhberg, 2006). The intensity of this movement is such that some observers even speak about an 'epidemic' of education reforms (Levin, 1998; Steiner-Khamsi, 2004). This reform movement emphasises a mix of market and managerialist policy solutions as the most effective way to solve old and new educational problems. As a consequence, choice, competition, incentives, and accountability are becoming increasingly central policy principles in the global education agenda and in the re-structuring of educational systems all around the globe.

The main objectives of the current Global Managerial Education Reforms (GMERs) are to improve countries' competitiveness by upgrading students' learning achievement and, at the same time, enhancing the efficiency of education systems. Some of the most well-known policies being implemented in the context of GMERs are school-based management and related forms of decentralization, accountability policies, teachers' evaluation, standards-based curriculum, target-setting and public-private partnerships (PPPs) in education. GMERs tend to modify the working conditions of teachers and their responsibilities, as well as how teachers' performance is assessed and judged by the state and society.

This introductory chapter is structured as follows. In the first part, we present the main characteristics of GMERs and review the key policies and ideas that constitute them. We also discuss how these types of policies transform the relationship between the state and education, and why and how they are being disseminated and adopted in many parts of the world. In the second part, we explore the main issues and controversies of this type of reforms in relation to teachers. Specifically, we highlight some of the main paradoxes of GMERs in the way they understand teachers' labour and aim to transform it. In the third and last part, we present the book's structure and content, and outline the main questions that it addresses.

## MAIN FEATURES OF GLOBAL EDUCATION REFORMS

The education reforms analysed here have a strong managerial understanding of what are the most important educational problems, how education change should be carried out and how educational systems should be organised. One of the main objectives of GMERs is to increase education quality standards, but without necessarily investing more resources in education systems. GMER focus on how schools should be managed, financed and made accountable, and on how conditional incentives should be introduced into the education system to reward or punish actors according to their performance. In particular, they are very supportive of school autonomy ideas, and of promoting competition between schools via standardised testing and demand-side interventions such as vouchers or other types of capitation grants. In general, GMERs are strongly framed by an economic rationality and assumptions coming from economic theory concerning families, principals and teachers behaving as self- interested and benefit-maximiser agents, and about the possibility of retrieving and sharing perfect information about schools' quality.

Interestingly, GMERs promoters' main aim is to improve the levels of student learning, but, in their analysis and prescriptions, they do not explore sufficiently how and why students learn. In other words, they want to transform education without engaging directly with the core business of education: the teaching-learning processes.

## The new role of the state in education: Neoliberal reforms, or something else?

Educationists usually qualify the managerial type of reforms analysed in this book as 'neoliberal' (see, for instance, Hill, 2009). There are different and competing definitions of neoliberalism; however, we do not think that the neoliberal label completely captures the type of phenomenon discussed here. Neoliberal reforms are, first and foremost, finance- driven reforms. They are committed with efficiency, above all else (Carnoy, 1999). However, the managerial change of education system is not necessarily more efficient than conventional

education provision.

GMERs advocates are enthusiastic about importing market rules and using market analogies when promoting their policies, as neoliberalism is, but this does not mean that they advocate the pure marketisation/privatisation of education, or the retirement of the state. In fact, this type of reform requires the state being more active than ever in education, although by adopting different roles. Thus, according to GMERs, the state should not provide education directly, and focus on the regulation and funding of schools –preferably, under demand funding formulas–, as well as on the evaluation and control of the performance of schools. Moreover, as many accountability policies establish, the state should use evaluations to inform society about schools' performance publicly, and reward and punish schools according to their progress.

## Why are managerial reforms globalised?

The fact that the managerial approach to education reform has been globalised is, to a great extent, related to the material and ideational power of the organisations backing them. These reforms count on persistent promoters strategically located in very influential and well-connected international organisations, the World Bank being the most outstanding.

The global education reform movement benefits from the fact that, especially in developing contexts, governments feel increasing pressure to achieve the Education For All (EFA) goals. However, rich countries are not exempt from international pressure either. due to the increasing international pressure stemming from international standardised tests, loan conditionalities, the EFA Action Framework and so on, more and more governments are open to experimenting with 'innovative' ways of education delivery and to adopting new managerial approaches.

### TEACHERS IN GLOBAL EDUCATION REFORMS

In a globalised economy, education, skills and knowledge are increasingly seen as key assets for economic competitiveness, and most countries and regions in the world aspire to become "knowledge economies" (Gouvias, 2007). As part of this aspiration, education becomes more central in the development strategies of governments and, in particular, "schools and teachers are being asked to do more than they have done before, but also in a different way" (Sahlberg, 2006, p.283). Overall, the international development community pays increasing attention to the key role that teachers play in the provision of quality education for all (Leu, 2005).

What social sciences research and, more recently, the OECD/PISA show is that, if education quality or learning outcomes are to be improved, society needs to take the equity between and within schools, as well as the social, economic and cultural conditionings that affect student learning more seriously. Unfortunately, managerial educational reformers tend to omit the importance of these types of elements when prescribing specific policy tools that aim at improving student learning (Verger and Bonal, 2012).

## Main paradoxes in the relationship between GMERs and teachers

Global education reformers join the international consensus about teachers' performance as a key determinant of education quality and, very often, put teachers at the centre of their policy ideas and interventions. The policy interventions designed in the context of the GMERs movement have the potential to transform teachers' work in several ways. Teacher evaluation and related accountability policies aim to enhance the visibility of teachers' work vis-à-vis both the state and the rest of society; merit-based policies aim at regulating teachers' salaries according to their performance; standards-based reforms detail what teachers have to learn and teach; PPPs favour the deregulation of teachers' labour; and school-based management reinforces the role of teachers as both school managers and, to some extent, community workers.

Overall, the way teachers are perceived and treated in GMERs often involves a multitude of paradoxes and

shortcomings. Below, we highlight the most evident of them.

The first paradox consists of the fact that GMERs continuously stress the importance of teachers and emphasise the key role they play in education quality, but simultaneously disempower them in several ways. Specifically, they do so in three ways: a) by not sufficiently taking into account their preferences in policy processes, b) by treating teachers as assets to be managed rather than as agents of change, and c) by undermining their autonomy in front of the state and students' families.

The second paradox relates to the fact that managerial reforms request more responsibilities from teachers but, at the same time, advocate their de-professionalisation. Teachers are supposed to do more things than before and in a different way, even when their preparation and work conditions might be poorer.

The third paradox is related to how GMERs advocates use evidence in a very 'selective' way. On the one hand, they promote managerial reforms even when they are aware of the fact that evidence of the positive impact of such reforms in learning outcomes is still inconclusive (Bruns et al., 2011; Experton, 1999; Patrinos et al., 2009; Vegas, 2005). On the other hand, however, they seem to ignore that the level of learning outcomes is higher in countries where their policy prescriptions are very marginal (or, in fact, have not been even implemented yet).

The fourth and last paradox identified is that GMERs ask teachers and schools to assume new duties and more complex mandates, but without taking into account whether there are the necessary material and technical conditions to undertake them.

Overall, this book is openly explicit of the limitations of basing education reforms on the mix of managerialist and market ideas that GMERs represent. Specifically, the main questions that this book aims at answering are:

1. How are global education reforms re-contextualised and translated into particular contexts? What are the mediating elements and institutions affecting the translation and re-contextualisation of GMERs to particular education contexts?
2. What are the specific difficulties associated with the implementation of global/managerial education policies in local contexts? Specifically, how are they received by teachers and other local education stakeholders? To what extent are GMERs enacted or resisted by them?
3. According to the key education stakeholders involved in the reforms, do GMERs bring about the intended results? What are the main challenges and opportunities of this type of reforms when it comes to achieve their expected outcomes?
4. To what extent are the main assumptions and 'theories of action' behind GMERs substantiated by the actual facts, once the reforms are implemented and translated into specific educational practices?

However, it should also be pointed out that this is not an "anti-reform" book. Rather, it is hoped that the different chapters provide elements to teachers, practitioners, aid agencies and other education stakeholders to reflect on educational change processes that could be, on the one hand, more in line with the education realities and problems prevailing in their particular contexts and, on the other, more participatory and respectful in nature with teachers' needs and identities.

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## ALWAYS LEARNING

# The Rise and Rise of Pearson PLC

By:Anna Hogan

Theme:Trade and Education



The focus of this article is on the world's largest edu-business, Pearson PLC. But while Pearson is in the spotlight, it is important to note that our analysis is about a much broader phenomenon, namely the explosion of commercial entities seeking to profit from various aspects of public education. The rapid growth of the global education industry is set against shifting governance structures where national governments now look to the private sector for 'solutions' to their various education 'problems' (Ball, 2012). In the Global North this relationship is formed on the basis of testing and accountability infrastructures, data management and online learning needs. In the Global South the focus has been on the rapid expansion of low-fee, for-profit schools in the absence of quality public schooling.

## Introduction

By capitalising on these global needs, Pearson generated £4.9 billion in sales and had an adjusted operating profit of £720 million during 2014. These results netted Pearson shareholders a 32% increase in their share price over the previous 12 months and made it the 23rd consecutive year for increased dividends per share (Pearson annual report, 2015). These impressive statistics show that Pearson is an incredibly successful business, committed to increasing profits for its shareholders. However, the obvious concern for many of us committed to democratic public schooling is how the public interest can be supported by edu-businesses when profit making is their bottom line?

This concern has been the focus of much critique of Pearson, particularly in the United States where the company's influence is currently felt to be most pervasive (see Ravitch, 2013, Hursh, 2016). Social commentators tend to view corporations like Pearson as powerful, monolithic entities working to monopolise

the education market. As Ravitch (2012) observes, 'it is widely recognized by everyone other than Pearson that its tentacles have grown too long and too aggressive' and that soon every aspect of American education will be 'invaded by Pearson's corporate grasp'. Pearson is now acutely aware of their increasing influence—the 'Pearsonization' of American schooling—and public concern about its reach into public education. As Hozler (2010) points out, it is near impossible for corporations to avoid the 'goldfish bowl' of public scrutiny and, as such, they are forced to respond to the public's perception and evaluation of their actions. Indeed, Pearson has been working hard over recent years to reconstitute its public image and position itself as simultaneously accountable to its shareholders and the public.

## Investing in a positive public image

Pearson has been fashioning its image as a socially responsible edu-business. In the past, corporate social responsibility (CSR) has been considered a matter of philanthropy, whereby corporations invest some of their profits back into the community to make a positive contribution to society. This approach to CSR was evident in Pearson's business model until late 2014, when it announced an end to the work of the Pearson Foundation. As explained by the Pearson Foundation (2014), 'this [followed] a decision by Pearson plc to integrate all of its corporate social responsibilities and functions into its business as a way to maximise social impact and to no longer fund the Foundation as the primary vehicle for its philanthropic and community activities'. This effectively 'mainstreamed' CSR for Pearson, integrating its philanthropic functions into its everyday business activities. Bishop and Green (2008, p.177) describe this phenomenon as 'philanthrocapitalism', in which CSR is driven by the belief that doing good can also be profitable.

A very tangible aspect of Pearson's CSR agenda is its Efficacy Framework. The Efficacy Framework is part of Pearson's commitment to ensure that its educational products and services have a measurable impact on learner outcomes. Pearson's emphasis on 'efficacy' borrows from usage of the term in the pharmaceutical industry and reflects the trend toward the medicalization of education research. Indeed, the promotional materials describing Pearson's Efficacy agenda include an image of a researcher in a laboratory working with test tubes, conjuring an association between Pearson's evaluation of its products and the 'rigour' of medical research.

Pearson's Efficacy Framework is a standardized review process, including a review tool in rubric format, which is used by the company to evaluate how well its products and services achieve desired outcomes. The Framework enables the rating of a product, program or service against criteria in the following four areas: outcomes; evidence; plans; and capacity. By giving each criterion a rating on a four-point colour scale, from green to red, the Framework can be used to assess how well a product is achieving its objectives and how it might be improved. As stated in Pearson's 2013 annual report, 'the Framework serves to identify specific areas which, if improved, will increase our likelihood of intended impact. Teams are able [to] focus their activity on taking these steps before the product is assessed again' (p.15). Pearson claim that 'all new product developments will have defined and measurable student outcomes' (Pearson plc, 2013, p.15).

In an age of what Nigel Thrift (2005) calls Knowing Capitalism, it is clear that Pearson's Efficacy Framework is about accountability. As Thrift (2005) explains, in the increasingly complex and unstable global economy, businesses 'now live in a permanent stage of emergency, always bordering on the edge of chaos' (p.78). In an effort to manage this context, Thrift argues that capitalism has in some ways become a research project of itself. Pearson realises that it has reached an influential and powerful position within the education marketplace and, if does not appear accountable for its products and services, it faces the risk of being interpreted as 'irresponsible' by the critical public. By ensuring its products and services are efficacious, Pearson has responded in a way that moralises its activities, presenting a corporation focused on a double bottom line of profitability and social responsibility, and thus, offers the public sector a means to trust their use of Pearson products and services.

## Capitalising on a positive public image

Pearson's new focus on efficacy is allowing the company to position itself as a legitimate education policy actor that has the potential to be influential in ways similar to national governments and international organisations. For example, Pearson has developed The Learning Curve (TLC), a fifty page report and associated website and database that offers recommendations for the reform of national schooling systems. TLC draws on international performance data collected by various international organisations, such as the Organisation for Economic Cooperation and Development (OECD), the International Association for the Evaluation of Educational Achievement (IEA) and the United Nations (UN). In synthesising these data, Pearson argues they have been able to assemble 'in one place a wide range of data sets which will enable researchers and policymakers to correlate education outcomes with wider social and economic outcomes more easily than ever before' (Pearson, 2012, p.3).

While Pearson expresses caution about using their research as a 'holy grail', TLC nonetheless outlines a number of 'definite signposts' for educational policymakers. The key findings of the report include the observation that strong relationships are few between education inputs and outputs; that income matters but culture matters more; that there is no substitute for good teachers; that good information is crucial for school choice; that there is no single path to better labour market outcomes; and that a global index can help highlight educational strengths and weaknesses (Pearson, 2012, p.8). The report then offers five key lessons for educational policymakers in terms of reform:

1. There are no magic bullets
2. Respect teachers
3. Culture can be changed
4. Parents are neither impediments to nor saviours of education
5. Educate for the future, not just the present (Pearson, 2012, 11)

Despite drawing out these 'key lessons', TLC was able to show only a handful of strong links: that higher GDP related to better PISA results; that better scores on the United Nations Development Program (UNDP) Human Development Index and Income Index are associated with higher upper secondary graduation rates; and that there is a link between more years spent in school and higher labour productivity.

The report explains that straightforward correlations are difficult to find and, as a result, 'education remains a black box in which inputs are turned into outputs in ways that are difficult to predict or quantify consistently' (p.7). In fact, when reading the report there seems to be a marked shift from the strong beginning claims that TLC is an important tool for assisting policymakers to quantify the link between knowledge and skills and economic competitiveness, and the realisation that 'the most striking result for correlations is the overall paucity of clear linkages' (p.14). From here the report suggests that the 'main message of the lack of strong correlations should be humility' (p.17).

Despite these shortcomings, we suggest that the reductive nature of TLC that condenses well-established data sets into easy-to-read formats with clear policy prescriptions is part of the new policy genre that plays on the anxieties of national policy makers. In providing national governments with a succinct construction of policy 'problems', Pearson can then offer policy makers guaranteed 'solutions' through the selling of their efficacious products and services. We would argue that TLC is a branding device for Pearson, indicative of their new focus on outcomes, and an evidence-base for potentially demonstrating return on investment for its customers: national and provincial governments, education systems and individual institutions, in both developed and developing countries.

While Pearson may be working to present itself as a socially responsible edu-business, clearly the success of the company rests upon profit. For example, the recent work of Junemann and Ball (2015) and Riep (2015), who have analysed how Pearson's support for low-fee for-profit schools in nations of the Global South, shows how the company is seeking to increase profit by expanding access to its education services. In the process,

Pearson's projected image of social responsibility is being quickly eroded by the positioning of low-fee for-profit schools as part of its corporate growth in emerging economies in Asia, Africa and South America. Here we see a complementarity between Pearson's business strategies in the Global North and those in the Global South, with a likely further push by Pearson to open for-profit schools in rich nations and expand testing and data management in poorer nations.

## Concerns for public education

We are critical of these developments in education from the grassroots to the global level. For example, the Efficacy Framework effectively bowdlerises the complexity of teaching and learning processes. The idea that one product or service can have a guaranteed impact on student outcomes could only be based on ignorance of the reality of what happens in classrooms; the vast contextual differences amongst schools and the diverse individual learning needs of students raise serious questions about the validity of Pearson's claims. Equally, the expertise of teachers and their wealth of professional knowledge, including pedagogical training, comprehension of content and their ability to differentiate learning is under-valued. Teachers are positioned as simply the implementers of Pearson's efficacious products that are guaranteed to improve learner outcomes. In fact, Pearson found through its efficacy reviews that one of the key issues preventing the desired outcomes of their products was the teacher's lack of skill in delivery; hence their new focus on professional learning around these issues. In Australia, for example, Pearson offers professional development for teachers through the Pearson Academy.

Pearson is also impacting on global education policy. Pearson has the contract to prepare key elements of the 2018 PISA tests, and while we would argue that TLC does not currently function as an influential public policy instrument, it is reflective of the enhanced involvement of Pearson in the global politics of educational comparison. While Pearson's relationships with governments and other organisations is often contractual, we would argue that their services for governments involve conceptual, technical and design work, as well as data generation, and this moves its contributions into the realm of policy making. This is particularly evident in Pearson's focus on low-fee for-profit schools, and is enough to discount their claims of being a socially responsible edu-business. We are critical here as well of aid agencies such as the UK's Department for International Development (DfID), which provides aid money for the creation of for-profit schools in some parts of sub-Saharan Africa. We stress, as well, that it is the restructured state and the values underpinning public policy that enable these developments. Given this enhanced role of edu-businesses in education policy, we are also concerned about the potential democratic deficit in these developments. Given that Pearson does not have a democratic constituency, its growing involvement in public education corresponds with diminished capacities of national political constituencies to influence policy production and thus the surreptitious weakening of democracy in relation to processes of education policy making.

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Anna's research interests broadly focus on education policy and practice. Specifically, she investigates the role of edu-businesses (or private corporations) in education and the effects these entities have on curriculum and assessment practices from the local to the global level. Her recent publications critically analyse the increasing commercialisation of education, the associated rise of edu-business, and the effects of private practice on public policy processes.

## COMMERCIALIZATION OF EDUCATION IN THE PHILIPPINES

Pearson, Ayala Corporation and the emergence of private educational centers at low prices

**By:Curtis B. Riep**

**Theme:Trade and Education**



**Corporate sector influence and participation in public sector education is on the rise globally. As the global demand for quality basic education grows more rapidly than government provision and supply, private corporations have entered the sector to both fill the "governance gap" and pursue new commercial opportunities in education (see Ball, 2012; Bhanji, 2008). As a result, transnational corporations have increasingly become influential, yet unaccountable, actors, partners, providers, entrepreneurs and enablers of governmental logics and processes connected to neoliberal globalization that continue to transform education into a sector guided by market principles, financial imperatives, and capital accumulation strategies. However, by treating education as a commodity that is privately provided through market mechanisms rather than as a publically redistributed and de-commodified societal good, in various contexts education is increasingly becoming a source of social disparity and inequity. This study focuses on a case of corporatized education in the Philippines.**

On April 24, 2013 the Philippines' Department of Education (DepED) along with Pearson<sup>1</sup> (the largest education company in the world) and Ayala Corporation<sup>2</sup> (one of the largest business conglomerates in the Philippines) signed a Memorandum of Understanding (MOU) that states:

With the passage of the the 'Enhanced Basic Education Act of 2013' mandating the introduction of Grades 11 and 12, there is an urgent need to provide affordable quality education to millions of the Filipino children of secondary school age, whose only option, at present, is to enroll in an overcrowded public school. (DepED & APEC, 2013, p.1)

The MOU further adds that in the Philippines:

The Constitution 'recognizes the complementary roles of public and private institutions in the educational system' and the unequivocal declaration by the state of the necessary role which private education plays in society. (DepED & APEC, 2013, p.1)

In 2014, over 7.2 million students were enrolled in public and private secondary schools in the Philippines (5.9

million in public and 1.3 million in private) (Luistro, 2015). However, several hundred thousand Filipino youth still remain out of secondary school. An overburdened and under-resourced system unable to accommodate all students effectively will soon have to provide two more additional years of senior high school (Grade 11 and 12) given the implementation of the Enhanced Basic Education Act or “K-12” system). An educational crisis, therefore, is looming in the Philippines given the “urgent need” to provide quality education to millions of Filipino children of secondary school age. In response, a corporate-led, state-sponsored “solution” involving private, for-profit provision is taking shape in the form of a large-scale chain of low-cost private high schools known as APEC (Affordable Private Education Centers).

Since the government has not upheld its constitutional responsibility to provide free and accessible public education for all, the result has been an overcrowded and inadequately financed system that is unable to accommodate the most marginalized learners. In order to finance the K-12 system, the Philippine government plans to extensively expand the voucher program to leverage private investment and resources to help grow more private schools.

Throughout periods of imperialism and neoliberalization, national education in the Philippines has been structured and restructured in ways that benefit the profit-oriented political and economic interests of foreign and domestic elites. Intensifying privatization in the form of expanded PPPs and vouchers in Philippine education has brought along commercial opportunities for private enterprise to participate in the sector. In the Philippines, the education services industry represents an enormous market opportunity for global edu-businesses. Consequently, Pearson, the world’s largest multinational education corporation, entered the Philippine education market by partnering with Ayala Corporation to establish APEC.

APEC is a for-profit chain of low-cost private high schools (Grades 7 – 12) that currently serves more than 1,500 students in 12 schools in Metro Manila. It plans to double its chain to 24 schools by 2015/16, while serving more than 4,000 clients. Pearson – through its venture capital fund the Pearson Affordable Learning Fund (PALF) – along with Ayala Corporation – through its edu-business arm, Livelt Global Services Management Institute (LGSMI) – have created APEC, a new corporate entity that will manage and scale the secondary school chain. Pearson and Ayala have agreed to invest up to PHP400 million (US\$8.5 million) between 2013 and 2018 in order to scale the chain through a pilot of 50 low-cost private high schools (DepED & APEC, 2013).

APEC as a corporately-owned and operated chain of low-fee private schools (LFPS) aims to offset excess demand for basic education in the Philippines by selling for-profit services to low-income households that are charged nominally “low-fees”.

Pearson and Ayala Corporation. APEC is a joint venture that “combines Pearson’s deep education expertise with Ayala’s operational experience in the Philippines”<sup>3</sup> in order to expand the educational franchise to as many low-income, fee-paying Filipino students and their families as possible. By offering “no frills” education at a price-point deemed “affordable” for the masses, APEC plans to attract students from overcrowded free public schools and more-costly private schools as part of a capital accumulation strategy designed to sell privatized services to low-income consumer/learners. Yet, with a price tag of PHP24,850 (more than US\$500) per year, or about PHP70 (about US\$1.5) per day, services offered by APEC remain far out of reach for the most “economically disadvantaged” Filipino youth.

While APEC is patterned after other low-cost private school enterprises, it is differentiated by its focus on secondary, rather than primary, schooling. Still, the underlying objective of these large-scale chains of LFPSs remains the same: serve the largest number of fee-paying students at the lowest possible cost in order to increase profit margins. APEC, for example, has deployed a number of cost-cutting techniques, such as hiring underqualified and underpaid teachers and renting unused office space in commercial buildings that function as APEC’s low-cost commercial school sites. Strategies implemented by APEC intended to reduce operational costs and increase profits will be elaborated further on in this report in relation to their effects on teachers and learners.

APEC reflects a capital accumulation strategy in Philippine education that aims to take advantage of K-12 restructuring, current “gaps” in the secondary school market, as well as an expansionary voucher system. Offering low-cost private high schooling aligns with the government’s mandate to support and subsidize neoliberal development, including privatizations in/of education.

Although APEC claims its services will expand the educational franchise to more low-income learners who otherwise might not be able to afford private education, at a price of PHP24,850 (or more than US\$500) per year, these commercialized services are still far out of reach for the poorest students in the Philippines. “Fee-paying forms of commercialized learning for the poor involve a distinct and unmissable structural inequity, user fees, which deny access to those already marginalized by poverty” (Riep, 2015, p. 20).

The government is expected to concede its sovereign power over matters of educational governance in order to serve the interests of private enterprise – even though APEC’s edu-business model is in direct violation of a number of regulations concerning basic educational provision in the Philippines.

APEC is patterned after other rapidly growing chains of LFPSs such as Bridge International Academies in Kenya and Omega Schools in Ghana. Similar to these other LFPS companies, APEC is based on long-term rates of return<sup>4</sup> and profitability achieved through economies of scale. APEC plans to benefit from economies of scale by lowering the per-unit cost “to educate” each student/customer, while expanding the size of its operations, in order to increase rates of profitability.

By serving a large volume of fee-paying students, while reducing the costs of production as the company scales-up its for-profit services, APEC plans to increase its market-based returns as it continues to grow. With 250,000 students – each paying more than US\$500 per year – APEC is set to become a highly lucrative venture.

Profits accumulated by APEC and its shareholder are “actually the difference between two sets of prices, the price of the goods produced and their cost, i.e., the price of the goods necessary to produce them” (Polanyi, 2001, p. 72). In an effort to minimize production costs while increasing profit margins, APEC has implemented a number of cost-cutting techniques. These include a low-cost rent model that involves short-term leases in unused commercial buildings that lack the adequate space for libraries, gymnasiums, science and/or computer laboratories. For APEC, this low-cost rent scheme is drastically cheaper than purchasing land and constructing proper school facilities. Teachers hired by APEC are also typically unlicensed and, therefore, paid severely low wages. All of these cost reduction techniques are intended to minimize operational costs so that the corporation can remain financially sustainable and profitable. Therefore, in the business of low-cost private schooling “sometimes quality is compromised because of the companies’ concern for making a profit” remarked one APEC school manager. Yet, APEC is still advertised as “world class private education from Ayala and Pearson.” Further problematic is that DepED remains complicit in this arrangement, since it has relaxed a number of regulations that govern the provision of basic education in the Philippines, so that APEC and its shareholders can implement their low-cost, for-profit schooling experiment with limited government restrictions. The proliferation of private, for-profit basic education must be properly regulated by governments to safeguard education as a societal good.

APEC also represents a corporate strategy designed to manufacture cheap and flexible labor required by Ayala and other multinational companies through its provision of privatized basic education that aligns with the labor needs of industry. By “reverse-engineering” its curriculum, APEC intends to produce graduates of a particular disposition with specific skills, values, and knowledge that can be employed in the global labor market. In particular, APEC aims to address the skill shortage in the BPO/call center industry in the Philippines by focusing on English communication skills. In turn, APEC schools involve two forms of privatization: de facto privatization of basic education and privatization that exists because of the “increasing socialization of productive forces and continuing private control in the social relations of production” (Jessop & Sum 2006, p. 343). By extending and intensifying private control and influence in the social relations of production through its provision of basic education, Ayala and Pearson aim to socialize the forces of production by inculcating skills and values that can be employed by multinational companies. As Congressman Antonio Tinio explains:

Big business has moved into the education sector because they are motivated by the view that the quality of education in the Philippines is in decline, we're lagging behind, and we're no longer competitive in the global market. Business can't wait for government to fix the situation so they'll invest and do it themselves. So the key motivation is global competitiveness. The kind of education they are pushing for is one that will develop the skills for the global labor market. So, the impact of the corporatization of education here in the Philippines is supposedly to strengthen ties with the global labor market. Will this lead to genuine development for the majority of Filipinos? We think not. Filipinos will not lift themselves out of poverty by exporting our labor or educating our students so they can become low-paid, low-skilled workers for foreign companies.

By subsidizing the growth of private provision through an expansionary voucher system, DepED is delaying the need to construct more government high schools and hire more government teachers. Instead, a market-based approach involving increased private enterprise and participation has been encouraged in order to leverage private investment and resources that might help alleviate pressures on an overburdened public system. In turn, this has opened-up new commercial opportunities for global edu-businesses. Pearson and Ayala have entered the sector to both fill the "governance gap" and profit from its provision of low-cost education services. APEC intends to reduce production costs to "educate" each student so that it can lower consumer costs and serve the highest number of fee-paying students. The bottom line, however, is that APEC is a for-profit company concerned with business growth and profitability, which can have detrimental effects on the quality of learning.

1 <https://www.pearson.com>

2 <http://www.ayala.com.ph>

3

<https://www.pearson.com/news/announcements/2014/january/pearson-announceschoolchainjointventurewithayalacorporationinth.html>. Accessed on April 3, 2015.

4 An internal rate of return for its investors in the range of 10-15% is expected over 10-15 years (J. Centenera, personal communication, May 1, 2015).

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