

Chapter 1

Overview and Introduction



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Abstract The chapter analyses current emerging research trends in education reforms globally. The chapter critiques and evaluates a neo-liberal and neoconservative education policy reforms. It discusses meta-ideological hegemony and paradigm shifts in education, dominated by standards-driven culture and students' academic achievement. It analyses discourses of globalisation processes impacting on education and policy reforms, both locally and globally, designed to promote economic competitiveness, national identity and social equity through education reforms. The chapter critiques standards-driven and outcomes-defined policy. The analysis of education policy reforms, and the resultant social stratifications in the global culture, demonstrates a complex nexus between globalisation, ideology and education reforms – where, on the one hand, democratisation and progressive pedagogy is equated with equality, inclusion, equity, tolerance and human rights, while on the other hand, globalisation is perceived, by some critics at least, to be a totalising force that is widening the inequality, and the socio-economic status (SES) gap and cultural and economic capital between the rich and the poor, and bringing power, domination and control by corporate bodies and powerful organisations.

1.1 Global Trends in Education and Academic Achievement

Since the 1980s, globalisation, marketisation and academic standards driven reforms around the world have resulted in structural, ideological and qualitative changes in education and policy (Appadurai 1996; OECD 2020; Zajda 2020a). They including an increasing focus on the UNESCO's concepts of knowledge society, the lifelong learning for all (a 'cradle-to-grave' vision of learning) representing the lifelong learning paradigm and the "knowledge economy" and the global culture. In their quest for excellence, quality and accountability in education, governments increasingly turn to international and comparative education data analysis. All agree that the major goal of education is to enhance the individual's social and economic prospects. This can only be achieved by providing quality education for *all*. Students'

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academic achievement is now regularly monitored and measured within the ‘internationally agreed framework’ of the OECD’s Programme for International Student Assessment (PISA). This was done in response to the growing demand for international comparisons of educational outcomes (see Zajda 2020b). To measure levels of academic performance in the global culture, the OECD, in co-operation with UNESCO, is using *World Education Indicators* (WEI) programme, covering a broad range of comparative indicators, which report on the resource invested in education and their returns to individuals.

The 2011 OECD and 2019a, b reports address the importance of achieving quality and equality of educational outcomes, through ensuring equity, and supported by a fair allocation of resources, to achieve quality of education for all (See OECD 2020). This policy goal has become a dominant ideology in global educational standards (Zajda 2020b). The report also refers to factors which affect educational outcomes, including ‘attending a school with positive student-teacher relations, certified teachers, and a strong infrastructure’ (OECD 2011, p. 454). Furthermore, the significance of inclusive school systems – those that support diversity among all learners was already highlighted in the *Education at a Glance* (2011), which stated that: ‘school systems with greater levels of inclusion have better overall outcomes and less inequality’ (p. 455). Schools systems tend to be inclusive when experienced teachers and material resources are evenly distributed among schools:

. . . In some school systems, inequality is entrenched through the mechanisms in which students are allocated to schools, including tracks that channel students into different schools based on their prior achievement or ability, private schools and special programmes in the public sector’ (OECD 2011, p.455).

The 2011 and 2013 OECD’s reports on income inequality, *Divided We Stand* (2011), *Inequality rising faster than ever* (2013a), and *Crisis squeezes income and puts pressure on inequality and poverty* (2013b) documented that the gap between rich and poor in OECD countries had widened continuously over the last three decades to 2008, reaching an all-time high in 2007. According to the OECD report (2013a), economic inequality has increased by more ‘over the past three years to the end of 2010 than in previous twelve’. The report also notes that inequality in America today ‘exceeds the records last reached in the 1920s. The United States has the fourth-highest level of inequality in the developed world’ (OECD 2013b). The widening economic and social inequalities in education are due to market-oriented economies, governance and schooling. Social inequalities, based on economic and cultural capital, and socio-economic status (SES) and exclusion, are more than real (OECD 2018; World Bank 2019; UNDESA World Social Report 2020; Zajda, 2011, 2020a). Access and equity continue to be ‘enduring concerns’ in education (OECD 2002, p. 26, 2013a, 2020).

1.1.1 Comparative View of Academic Achievement

The OECD's PISA international survey presents an encyclopaedic view of the comparative review of education systems in OECD member countries and in other countries. It assesses the competencies of 15-year-olds in reading, mathematics and science in more than 90 countries and economies. At least half of the indicators relate to the output and outcomes of education, and one-third focus on equity issues (gender differences, special education needs, inequalities in literacy skills and income).

The chapters in the *Handbook* comment on education policies, outcomes, differences in participation, competencies demanded in the knowledge society, and alternative futures for schools. Only a minority of countries seem to be well on the way of making literacy for all a reality. For the rest, illiteracy, as confirmed by the OECD study, was at the time, "largely an unfinished agenda" (OECD 2002, *Education Policy Analysis*, p. 67).

The major focus of the OECD survey was on quality of learning outcomes and the policies that shape these outcomes. It also contained the OECD's Programme for International Student Assessment (PISA), the performance indicators which examined equity issues and outcomes – with reference to gender, SES and other variables. The performance indicators were grouped according to educational outcomes for individual countries. The OECD international survey concludes with a set of policy questions that are likely to shape the "What Future for Our Schools?" policy debate. These encompass *cultural* and *political* dimensions (public attitudes to education, the degree of consensus or conflict over goals and outcomes), accountability, and diversity vs. uniformity, resourcing (to avoid widening inequalities in resources per student, as demonstrated by current trends in some of the OECD's countries), teacher professionalism, and schools as centres of lifelong learning.

1.1.2 Schools for the Future

One could conclude with six scenarios for tomorrow's schools (see OECD 2002, *Education Policy Analysis*). The first two scenarios are based on current trends, one continuing the existing institutionalised systems, the other responding to globalisation and marketisation, and facilitating market-oriented schooling. The next two scenarios address 're-schooling' issues, with schools developing stronger community links and becoming flexible learning organisations. The last two scenarios of 'de-schooling' futures suggest a radical transformation of schools – as non-formal learning networks, supported by both ICTs and a network society, and a possible withering away, or 'meltdown' of school systems (OECD 2002, *Education Policy Analysis*, p. 119).

Education policy issues raised by Michael Barber (2000) in his keynote address 'The Evidence of Things not Seen: Reconceptualising Public Education' at the

OECD/Netherlands Rotterdam International Conference on Schooling for Tomorrow (see CERI website at www.oecd.org/cer) include the five “strategic challenges” and four “deliverable goals” for tomorrow’s schools:

Strategic challenges

- reconceptualising teaching
- creating high autonomy/high performance
- building capacity and managing knowledge
- establishing new partnerships
- reinventing the role of government

Deliverable goals

- achieving universally high standards
- narrowing the achievement gap
- unlocking individualisation
- promoting education with character

The questions that arise from the strategic challenges and deliverable goals framework, and which are useful in delineating the policy challenges and the goals pursued, centre on the issue of equality, or egalitarianism (rather than meritocracy) in education. Specifically, one can refer to the different cultural and political environments, which affect the nature of schooling. Diversity and uniformity, with reference to equality of opportunity needs to be considered. Important equity questions are raised by centralisation/decentralisation, diversity/uniformity and curriculum standardisation issues, the unresolved ideological dilemmas embedded in educational policy content and analysis. These are followed up by the authors of the *Handbook*. Their writing reveals these and other problems confronting educators and policy-makers globally.

1.1.3 Educational Policy Goals and Outcomes

In analysing the discrepancy between educational policy goals and outcomes Psacharopoulos (1989) argued that the reason why reforms fail is that the ‘intended policy was never implemented’ and that policies were ‘vaguely stated’, financial implications were not worked out, and policies were based on good will rather than on ‘research-proven cause-effect relationships’ (p. 179). Similar conclusions were reached by the authors of *Education Policy Analysis* (2001), who note that the reasons why reforms fail is that policy makers are ‘flying blind’ when it comes to policy outcomes (lack of reliable data on the progress made). In their view it is virtually impossible to measure how well different areas of policy work together as systems of the intended reform program. There are large and critical gaps in comparative data (the cost of learning and the volume and nature of learning activities and outcomes outside the formal education sector). There is also a need to refine

comparative data, especially performance indicators, as current outcomes reflect “biases as to the goals and objectives” of lifelong learning (p. 69).

1.2 International Studies of Educational Achievement

Psacharopoulos (1995) questioned the validity and reliability of international comparisons of education policies, standards and academic achievement. In examining the changing nature of comparative education he offered a more pragmatic educational evaluation of policy, which is based on *deconstructing* international comparisons. He commented on the controversy surrounding the validity of international achievement comparisons (IEA and IAEP studies on achievement in different countries), unmasked an erroneous use of the achievement indicators (including the use of *gross* enrolment ratios, which neglect the age dimension of those attending school, rather than *net* enrolment ratios), and suggested various new approaches to comparative data analysis:

Comparative education research has changed a great deal since Sadler’s times. The questions then might have been at what age should one teach Greek and Latin? Or how English schools could learn from the teaching nature in Philadelphia schools? Today’s questions are:

- What are the welfare effects of different educational policies? . . .
- What are determinants of educational outputs? . . . (Psacharopoulos 1995, p. 280).

1.3 Globalisation, Education and Policy

The *Handbook* presents a global overview of developments in education and policy change during the last decade. It provides both a strategic education policy statement on recent shifts in education and policy research globally and offers new approaches to further exploration, development and improvement of education and policy making. The *Handbook* attempts to address some of the issues and problems confronting educators and policy-makers globally. Different articles in the *Handbook* seek to conceptualise the on-going problems of education policy formulation and implementation, and provide a useful synthesis of the education policy research conducted in different countries, and practical implications. This work offers, among other things, possible social and educational policy solutions to the new global dimensions of social inequality and the unequal distribution of socially valued commodities in the global culture (OECD 2013a, b, 2020).

One of the aims of the *Handbook* is to focus on the issues and dilemmas that can help us to understand more meaningfully the link between education, policy change and globalisation. The *Handbook*, is focusing on such issues as:

- The ambivalent nexus between globalisation, democracy and education – where, on the one hand, democratisation and progressive education is equated with equality, inclusion, equity, tolerance and human rights, and the other, globalisation is perceived by some critics to be a totalising force that is widening the gap between the rich and the poor, and bringing domination, power and control by corporate elites.
- The influence of identity politics, gender, race, ethnicity, religion and class politics on education policy research and reforms (Zajda and Majhanovich 2020).
- The significance of discourse, which defines and shapes education policy, reforms, and action
- The focus on the main actors (who participates and how and under what conditions?) who act as bridges in the local-national-global window of globalisation
- The contradictions of cultural homogenisation and cultural heterogenisation or the on-going dialectic between globalism and localism, and between modernity and tradition (Appadurai 1990, p. 295) and their impact on education and policy-making process.
- Interactions between diverse education policies and reforms and multidimensional typology of globalisation.
- The significance of the politics of globalisation and development in education policy – their effects on cross-cultural perceptions of such constructs as active citizenship, the nation-state, national identity, language(s), multiculturalism and pluralist democracy.
- The OECD (2002) model of the knowledge society, and associated strategic challenge’ and ‘deliverable goals’ (OECD 2002, p. 139),
- UNESCO-driven lifelong learning paradigm, and its relevance to education policy makers globally,
- Different models of policy planning, and equity questions that are raised by centralisation/decentralisation, diversity/uniformity and curriculum standardisation issues,
- The ‘crisis’ of educational quality, the debate over standards and excellence, and good and effective teaching.

By addressing the above themes, it is hoped the *Handbook* will contribute to a better and a more holistic understanding of the education policy and research nexus – offering possible strategies for the effective and pragmatic policy planning and implementation at the local, regional and national levels. The *Handbook* by examining some of the major education policy issues provides a more meaningful concept map better of the intersecting and diverse discourses of globalisation, education, ideology and policy-driven reforms (Zajda 2020b).

Perceiving education policy research and globalisation as dynamic and multifaceted processes necessitates a multiple perspective approach in the close-up study of education and society. As a result, the authors in the *Handbook* offer a rich mixture of globalisation discourses on current developments and reforms in education around the world. Understanding the ambivalent nexus between globalisation, education and culture – constructing similarities and differences in education reform

trajectories is likely to result in a better understanding of the globalisation process and its impact on educational institutions.

Globalisation of policy, trade and finance has some serious implications for education and reform implementation. The economic crises (e.g., the 1980s), together with the prioritised policies of the International Monetary Fund (IMF) and the World Bank have seriously affected some developing nations and transitional economies in delivering basic education for all (see *Preface*).

Some critics (see Robertson et al. 2002) have argued that the policies of the Organisation for Economic and Cooperative Development (OECD), UNESCO, the World Trade Organisation (WTO), and the General Agreement on Trade and Services (GATS) operate as powerful forces, which, as supranational organisations, shape and influence education and policy around the world. It has been argued recently that understanding the complex process of change and shifts in dominant ideologies in education and policy through the WTO-GATS process – as the key political and economic actors and “subjects of globalisation” can also help to understand the nexus between power, ideology and control in education and society:

Examining the politics of rescaling and the emergence of the WTO as a global actor enables us to see how education systems are both offered as a new service to trade in the global economy and pressured into responding to the logic of free trade globally...the WTO becomes a site where powerful countries are able to dominate and shape the rules of the game, and in a global economy some countries increasingly view opening their education systems to the global marketplace as a means of attracting foreign investment (Robertson et al. 2002, p. 495).

The above critique of globalisation, policy and education suggests new economic and cognitive forms of cultural imperialism. Such hegemonic shifts in ideology and policy may have significant economic and cultural implications on national education systems and policy implementations. For instance, in view of GATS constraints, and the continuing domination of multinational educational corporations and organisations in a global marketplace, the “basis of a national policy for knowledge production may be eroded in a free-market context of a knowledge-driven economy” (Robertson et al. 2002, p. 494). This erosion signifies the corresponding weakening of the traditional role of the university, being the pursuit of knowledge for its own sake (intrinsic):

...the heart of the academic dogma is the pursuit of knowledge for its own sake. Knowledge and the processes of coming to know are good in themselves, and the university, above all institutions, is – or used to be – devoted to them. To investigate, to find out, to organise and contemplate knowledge, these are what the university is about. . . (Nisbet 1971, p. vi).

Globalisation and the competitive market forces have generated a massive growth in the knowledge industries that are having profound effects on society and educational institutions. In the global culture the university, as other educational institutions, is now expected to invest its capital in the knowledge market. It increasingly acts as an entrepreneurial institution (see *Globalisation and the Changing Role of the University*). Such a managerial and entrepreneurial re-orientation would have been seen in the past as antithetical to the traditional ethos of the university of

providing knowledge for its own sake. Delanty (2001) noted that ‘with business schools and techno science on the rise, entrepreneurial values are enjoying a new legitimacy.. the critical voice of the university is more likely to be stifled than strengthened as a result of globalisation’ (Delanty 2001, p. 115).

It can be said that globalisation may have an adverse impact on the higher education sector, and education in general. One of the effects of globalisation is that the university is compelled to embrace the corporate ethos of the efficiency and profit-driven managerialism. As such, the new entrepreneurial university in the global culture succumbs to the economic gains offered by the neoliberal ideology (Zajda 2020a).

From the macro-social perspective it can be argued that in the domains of language, policy, education and national identity, nation-states are likely to lose their power and capacity to affect their future directions, as the struggle for knowledge domination, production, and dissemination becomes a new form of cultural domination, and a knowledge-driven social stratification. Furthermore, the evolving and constantly changing notions of national identity, language, border politics and citizenship, which are relevant to education policy, need to be critiqued within the local-regional-national arena, which is also contested by globalisation (Zajda and Majhanovich 2020). Current education policy research reflects a rapidly changing world, where citizens and consumers are experiencing a growing sense of uncertainty and alienation. Jarvis (2009) argued for the need to “rediscover” one’s social identity in active citizenship:

Democratic processes are being overturned and there is an increasing need to rediscover active citizenship in which men and women can work together for the common good, especially for those who are excluded as a result of the mechanisms of the global culture (Jarvis 2009, p. 295).

The above reflects both growing alienation and a Durkheimian sense of anomie in the world “invaded” by forces of globalisation, cultural imperialism, and global hegemonies that dictate the new economic, political and social regimes of truth. These newly constructed imperatives in educational policy could well operate as global master narratives, playing a hegemonic role within the framework of economic, political and cultural hybrids of globalisation (Zajda 2020b).

1.4 Multidimensional Aspect of Globalisation

While there is some general consensus on globalisation as a multi-faceted ideological construct defining a convergence of cultural, economic and political dimensions (‘global village’ now signifies and communicates global culture), there are significant differences in discourses of globalisation, partly due to differences of theoretical, ideological, and disciplinary perspectives. Multidimensional typology of globalisation reflects, in one sense, a more diverse interpretation of culture – the synthesis of technology, ideology, and organisation, specifically border crossings of

people, global finance and trade, IT convergence, as well as cross-cultural and communication convergence. In another sense, globalisation as a post-structuralist paradigm invites many competing and contesting interpretations. These include not only ideological interpretations but also discipline-based discourses, which include the notions of the homogenisation and hybridisation of cultures, the growth of social networks that transcend national boundaries supranational organisations, the decline of the nation-state, and the new mode of communication and IT that changes one's notion of time, and space.

Similarly there is a growing diversity of approaches to comparative education and policy research. Rust et al. (2003) identified 28 different theories in comparative education research, observing decline in structuralist paradigms and detecting a corresponding methodological shift towards humanist and post-structuralist comparative education research (Rust et al. 2003, pp. 5–27).

The chapters in the *Handbook* are compiled into five major sections:

1. Globalisation and education reforms: Main trends and issues
2. Globalisation and education policy reform
3. Globalisation and education policy: Comparative perspective
4. Globalisation and education reforms
5. Globalisation and education futures: Human rights

The *Handbook* contains 59 chapters, with each chapter containing 6000–8000 words. The use of sections served the purposes of providing a structure and coherence and sharing the workload between section editors. The general editors and section editors ensured that each draft chapter was reviewed by at least two (at times three) reviewers who examined the material presented in each manuscript for the content, style and appropriateness for inclusion in the *Handbook*.

1.5 Globalisation, Education and Policy Reforms

In the opening section of the *Handbook* there are eight chapters that address the nexus between globalisation and education. The leading chapter *The futures of education in globalization: Multiple drivers* (Yin Cheong Cheng, The Education University of Hong Kong) analyses the changing paradigms in globalisation and the futures of education reforms. The next chapter discusses globalisation, meta-ideology and education reforms. The chapter that follows analyses the future of global education politics. The fourth chapter examines the future of education reforms in post-apartheid South Africa. The fifth chapter discusses the impact of globalization on education and policy reforms in Latin America. The sixth chapter analyses the nexus between globalisation, meta-ideological hegemony and education. The seventh chapter examines discourses of globalisation and neo-liberalism. The concluding chapter evaluates the impact of globalisation and policy borrowing in education.

1.5.1 Globalisation and Higher Education

This section, containing seven chapters examines globalisation and higher education, and its impact on the reform in the higher education sector. The introductory chapter examines the impact of globalisation on the higher education and the work of the neoliberal university. The chapters that follow, analyse globalisation and higher education policy reforms, a drive for a world-class economic and educational performance in the Greater Bay area of China, the impact of globalisation on university rankings, higher education developments in the Arab region, globalisation in higher education: Bridging global and local education, and finally, the impact of globalisation on the mission of the university.

1.6 Globalisation and Education Policy Reform

This section contain 14 chapters, divided as follows:

1.6.1 Globalisation, Education Policy and Change

This section has six chapters. The lead chapter analyses PISA, ideology and a paradigm shift in education and policy and the problems facing educational institutions and policy-makers alike. The chapters that follow examine the nexus between globalisation, culture and thinking in comparative education, critical explorations in education and conflict, inclusion and globalisation in Russian education, tacit skills and occupational mobility in a global culture and globalisation and coloniality in education and development in Africa.

1.6.2 Globalisation and Educational Policy Issues

This section has eight chapters. The introductory chapter in this section, examines globalisation, culture and social transformation. The chapters that follow analyse minorities and education policies reforms in Central Asia, globalisation and Islamic education, globalisation, teachers and inclusive schooling, critical cosmopolitan literacies: Students' lived experience in a Canadian offshore school in Hong Kong, a new global lens for viewing children's literature, globalisation, cultural diversity and multiculturalism, and globalisation and pedagogy of peace.

1.7 Globalisation and Education Policy: Comparative Perspective

This section contains eight chapters. The introductory chapter examines development of moral and ethical reasoning: A Comparison of U.S. and international university students' moral reasoning skills. Other chapters analyse educational efficiency in New Zealand schools, globalisation and the case of civics and citizenship education in Australia, globalisation and improving basic education in Brazil, the language of instruction in Tanzania and South Africa: policies and practices, globalisation and the National Curriculum reform in Australia: The push for Asia literacy, education policy in the age of global migration: African immigrants and ESL education in Canada, and how higher education sector adapts to globalisation in Canada.

1.8 Globalisation and Education Reforms

This sections contains 13 chapters discussing globalisation and the expansion of shadow education, or private tutoring, what policy lessons can be learnt from high performing education systems of Singapore and Hong Kong, globalisation and educational policy shifts, education as a fault line in assessing democratization: ignoring the globalizing influence of schools, international evidence for the teaching of reading in New Zealand, cultural and social capital in global perspective, is a critical pedagogy of place enough?: Intersecting culturally sustaining pedagogies with environmental education, Nigeria's inter-faith, inter-ideology crisis: The need for global citizenship education, philosophical and pedagogical underpinnings of globalisation and education, service learning in an undergraduate primary teacher education program and transforming lives, capital and lower case letter use in early childhood education: A comparative Australasian and Swedish study, school-university partnerships and enhancing pre-service teacher understanding of community, and teaching historical causation in a global culture.

1.9 Globalisation and Education Futures: Human Rights

This sections contains eight chapter examining education futures: Language and human rights in global literacy, academic freedom between history and human rights in a global context, critical pedagogy and rights-respecting curriculum, a critical analysis of SDG 4 coverage in voluntary national reviews, scaffolding human rights education, globalisation and human rights education in Australia, the right to education, and finally the imperative of realising the child's right to quality education.

The above analysis of globalisation, ideology and education reforms by a number of scholars, demonstrates a complex nexus between globalisation, ideology and education reforms. The globalisation processes taking place today are likely to legitimise the unequal distribution of socially valued commodities, including economic, cultural and social capital available. Given that cultural capital is one of the most valuable social commodities, it will continue to play a significant role in affecting social mobility globally.

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