

# Chapter 1

## Globalisation and Education Reforms: Emerging Research Issues



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**Abstract** The chapter analyses current emerging research trends in education reforms around the world. The chapter critiques and evaluates a neo-liberal and neoconservative education policy reforms globally. It discusses meta-ideological hegemony and paradigm shifts in education. It analyses 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.

**Keywords** Assessment · Assessment frameworks · Comparative education · Education policy · Education quality · Global standardization of academic achievement · Globalization · Governance of education international large-scale assessments · Knowledge competencies · OECD · PIRLS · PISA · Policy impact

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## The Changing Nature of Education Globally

Globally, cultural, economic and technological exponential-like growth have raised the value of education as a desirable commodity, and, consequently increased the importance of ensuring that students have access to high-standards and quality education for all. Education reforms tend to be largely political in nature. Political ideologies guiding education reforms range from conservative and neo-liberal to progressive and emancipatory. Nations like USA, China, India, and Russia wish to be major players on the world's stage, economically and politically. All striving for competitive advantage globally. To maintain the edge of competitiveness and dominance in the political, economic and cultural sense, they need to have education addressing these aspirations. Current education reforms need to be examined at the curriculum level, policy level and vocational level.

At the curriculum level, the focus of current reforms is on improving knowledge and skills in literacy and numeracy, as well as in science, civics and history. However, in the USA, in particular, teachers are under pressure to improve standards in literacy and numeracy. As a result, teachers are compelled to spend many hours working in these areas, at times neglecting other subjects:

...teachers spend many hours a day trying to teach, especially in schools with low test scores, throughout elementary and sometimes middle school. Reading and math have taken over the curriculum in many schools, to the exclusion of subjects like history and science. (Wexler 2018, <https://www.forbes.com/sites/nataliewexler/2018/04/09/three-mistakes-we-need-to-fix-if-we-want-education-reform-to-succeed/#1a5ad7b77592>)

At the policy level, the politics of education reforms continue to target standards, assessment, accountability, and excellence and quality education for all. As Petrilli (2018) puts it:

Together, *today's* standards, assessments, and accountability systems provide a clear message to our elementary and middle schools: Your job is to get students on track for college, career, and citizenship by building the knowledge and skills, year by year, they will *need* to succeed (Petrilli 2018, <https://www.educationnext.org/where-education-reform-goes-here/>)

At the vocational level, education reforms aim to prepare students for fulfilling and rewarding career. Duncan and Spellings (2018) suggest that education should prepare students for career, citizenship, college and an upward economic and social mobility:

An educated populace, versed in civics, trained to reason and empowered to act is what safeguards our democracy. Equitable access to education—our greatest force for economic mobility, economic growth and a level playing field for all—is what underwrites the American meritocracy. (Duncan and Spellings 2018, <https://www.washingtonpost.com/>)

It is difficult to imagine another time in history when globalisation has had a greater cultural, economic, technological and political impact on educational systems. The increased importance of the knowledge industry, innovations in information and communication technologies, and a strong orientation toward the market economy, and global competitiveness affect every sector of education globally. At

the same time, globalisation has acquired a new meta-ideology, or the *global hegemonic meta-ideology* that carries strong elements of Western ideologies. In critiquing globalisation and its impact on education, we need to know how its ‘ideological packaging’ affect education practices around the world. As Carnoy and Rhoten (2002), wrote, there was a need to assess a possible nexus between globalisation, ideology, education reforms, and their impact on schooling, and standards-driven outcomes:

In assessing globalization’s true relationship to educational change, we need to know how globalization and its ideological packaging affect the overall delivery of schooling, from transnational paradigms, to national policies, to local practices. (Carnoy and Rhoten 2002, p. 3)

One of the most significant macro-social policy responses of the education sector, both locally and globally, to the market forces and competitiveness, are the competitiveness-driven reforms, or reforms due to shifting demands for jobs, skills, commodities and emerging markets. Globally, neo-liberalism in higher education policy reforms has been characteristic of capitalist societies (Zajda and Rust 2016). The politics of education reforms both locally and globally, reflect this new emerging paradigm of accountability, globalisation and academic capitalism, performance indicators and standards-driven policy change. As a result, the divided and highly elitist and stratified education sector, by means of their hegemonic structures, legitimises social inequality. Hence, equity-driven policy reforms in education, in the climate of neo-conservatism, are unlikely to succeed. One of the effects of globalisation is that the education sector, having modelled its goals and strategies on the market-oriented and *entrepreneurial* business model and standards-driven curriculum, is compelled to embrace the corporate ethos of the competitiveness, efficiency, accountability and profit-driven *managerialism*. Recent changes in the world economy have resulted in at least *four* responses of the education sector to market forces and increased competitiveness:

- Competitiveness-driven reforms (reforms due to shifting demands for skills, commodities and markets)
- Finance-driven reforms (reforms in public/private sectors, budgets, company income, cuts in education spending)
- Market force–driven reforms for dominance globally
- Equity-driven reforms (reforms to improve the quality of education and its role as source of upward social mobility) to increase equality of *economic opportunity* for students.

### ***Globalisation and Neo-liberalism in Education Reforms***

The ascent of a neo-liberal and neoconservative education policy, globally, which has redefined education and training as an investment in human capital and human resource development, has dominated education reforms since the 1980s. The litera-

ture relating to human capital theory demonstrates that education consistently emerges as the prime human capital investment. Human capital refers to “the productive capacities of human beings as income producing agents in the economy” (Zajda 2008, p. 45). Human capital research has found that education and training raises the productivity of workers by imparting useful knowledge and skills; improves a worker’s socio-economic status, career opportunities and income (Becker 1964, 1994; Schultz 1971; Levin 1987; Carnoy 1999; Saha 2005; Zajda 2007, 2015a, b) and plays a significant role in driving overall economic performance. In general, neo-liberalism in higher education policy reforms focuses on “meeting the needs of the market, technical education and job training, and revenue generation” (Saunders 2010, p. 54).

Globalisation, policy and the politics of current higher education reforms suggest new economic and political dimensions of neo-liberalism, and a new dimension of cultural imperialism. As the UNESCO’s humanistic model for education, so influential in the 1960s, was weakening, “the economic and techno-determinist paradigm of the International Monetary Fund (IMF), the World Bank and the Organisation for Economic Cooperation and Development (OECD) was gaining in prominence” (Zajda 2010, p. xvi). Such hegemonic shifts in ideology and policy were likely to have significant economic and cultural implications for the Australian higher education system, reforms and policy implementations. Forces of globalisation, manifesting themselves as a neo-liberal and bourgeois hegemony, tended to legitimate an “exploitative system” (McLaren and Farahmandpur 2005), and have contributed to the ongoing neo-liberal globalisation of the higher education sector in Australia. This is characterized by a relentless drive towards performance, global standards of excellence and quality, globalisation of academic assessment (OECD, PISA), global academic achievement syndrome (OECD, World Bank), global academic elitism and league tables for the universities (Zajda 2008, p. 3, 2015a, b). The latter signifies both ascribed and achieved status, the positioning of distinction, privilege, excellence and exclusivity. In higher education policy documents in the OECD, the World Bank, and Australia, policy reforms appear to be presented as a given, and as a necessary response to economic globalisation and global competitiveness.

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## ***Standards-Driven and Outcomes-Defined Policy Change***

One of the effects of economic forces of globalisation is that educational organisations, having modelled its goals and strategies on the entrepreneurial business model, are compelled to embrace the corporate ethos of the efficiency, accountability and profit-driven managerialism (Zajda 2018). Hence, the politics of education reforms in the twenty-first century reflect this new emerging paradigm of standards-driven and outcomes-defined policy change (Zajda 2015a, 2016, 2018). Some policy analysts have criticized the ubiquitous and excessive nature of standardization in education imposed by the EFA framework (Carnoy 1999; Torres 1998).

Whether one focuses on their positive or negative effects, at the bottom line, there was an agreement that the policies and practices of educational development had converged along the consensus built at the multilateral forum. (Carnoy 1999)

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. 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 (see also Sabour 2015; Zajda 2015a). It can be said that globalisation may have an adverse impact on education. One of the effects of globalisation on education in all spheres, is that it is compelled to embrace the corporate ethos of the efficiency and profit-driven managerialism. This is particularly evident in higher education. The new entrepreneurial university in the global culture succumbs to the economic gains offered by the neo-liberal ideology (Zajda 2015b).

## ***Globalisation, Marketisation and Quality/Efficiency Driven Reforms***

Globalisation, marketisation and quality/efficiency driven reforms around the world since the 1980s have resulted in structural and qualitative changes in education and policy, including an increasing focus on the “lifelong learning for all”, or a “cradle-to-grave” vision of learning and the “knowledge economy” in the global culture. Governments, in their quest for excellence, quality and accountability in education, increasingly turn to international and comparative education data analysis (Zajda 2018). All of them 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’ 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 (OECD, *Education policy outlook 2015: making reforms happen*). Yet, not all schools are successful in addressing the new academic standards imperatives, due to a number of factors, both internal and external. Cohen, for instance, attributes failure of education reforms in the USA due to fragmented school governance and the lack of coherent educational infrastructure.

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 (OECD 2016 *Education at a Glance – OECD Indicators*).

The both validity and reliability of PISA data has also been the subject of much debate. The test design in PISA is based on matrix sampling where each student is administered a subset of items from the total item pool. For example, as Johansson (2018), demonstrates, in PISA 2018, there were nearly 250 questions in the pool for the reading domain. Each student receives a test form or booklet comprising of four 30-min clusters, assembled from two subject domains. In 2018, reading was the core subject and two clusters in every test form comprised reading items. For countries taking reading math and science there were 36 test forms and different groups of students answered these (but only one). The items in the test forms are overlapping to certain degree (Johansson 2018).

Berliner (2018) questions PISA's test validity. He is concerned with the quite substantial differences between national raw scores and the scaled scores (plausible values) in PISA 2015. Wright also argues that PISA, as an instrument of the OECD, 'needs to provide better information to participant countries about the strengths and weaknesses of students in relation to the assessment frameworks, be more transparent about its methods, including the items used, and how measurement error is calculated, and broaden the assessment focus to include a broader range of competencies'. For instance, Araujo et al. (2017) acknowledge that the ambitious agenda of PISA to assess students' application of reading, mathematics, and science to challenging real-world contexts leaves the developers vulnerable to criticism. For example, the 2018 PISA framework for mathematics (OECD 2019) requires that students formulate situations mathematically, employ mathematical concepts, facts, procedures and reasoning, and interpret, employing and evaluating the results in context (p. 77). Seven mathematical processes are highlighted, communication, mathematization, representation, reasoning and argumentation, problem solving strategies, using language, and using mathematical tools. The complex framework is a mathematics educators dream. However, the challenge is whether it is possible to assess such complex outcomes in constrained test environments, particularly with multi-choice items. As Wright argues, PISA data, given the complexity of creating comparable assessments across over 65 nations, 'need to be interpreted with caution coupled with the ambitious frameworks created by PISA itself':

It is inevitable that many questions are asked about the reliability and validity of the tests. Critique about margins of error, representativeness of sampling, comparability of translations, use of a single dimension Rasch Scale to rank nations, and narrowness of content, suggest that results from PISA need to be interpreted with caution.

Even if PISA, and other large-scale assessments, meet the criteria for perfect knowledge, would it be safe to assume that the players in educational policy act rationally?. In discussing the merits of PISA for educational policy, Schleicher and Zoido (2016) state:

...that is why PISA does not venture into telling countries what they should do, but its strength lies in telling countries what everybody else around is doing and with what success. (Schleicher and Zoido 2016, p. 384)

## Globalisation, Educational Social Stratification and Social Inequality

Increasingly, schools, both locally and globally, are striving towards academic and cultural elitism. They project and market themselves in terms of distinction, academic excellence, and privilege. It has resulted in the divided schools: the elitist and academically performing schools, and other schools, resulting in educational social stratification. The need to address economic and social inequalities was discussed by Dervis (2007), who argued that globalisation has changed the world economy by creating “winners” and “losers”:

Globalization has fundamentally altered the world economy, creating winners and losers. Reducing inequalities both within and between countries, and building a more inclusive globalization is the most important development challenge of our time ... Addressing these inequalities is our era’s most important development challenge, and underscores why inclusive development is central to the mission of the UN and UNDP. (Dervis 2007)

In his informed critique of the human capital discourse, and its use in the logic of rates of return, or the impact of the quantity of education on earnings, Klees (2016) demonstrates that human capital theory and its connection between education and productivity is defined and driven by the ideology of meritocratic capitalism, and neo-liberal ideology, where its ‘rewards are more or less deserved’ (Klees 2016, p. 259). Consequently, it has been fashionable since the 1980s, to use the human capital and skills discourses to ‘blame individuals’, rather than social structures and organisations, for lack of education and job opportunities:

...for their lack of ‘investment’ in human capital, for their not attending school, for their dropping out of school, for their not studying the ‘right’ fields, for their lack of entrepreneurship. (Klees 2016, p. 259)

The very ideology of capitalism, conveniently legitimated by human capital theory, could never solve social inequality and poverty, because greater economic equality, employment and social justice are not the goals of capitalism. Capitalism, driven by the profit-maximisation incentive, makes social inequality, lack of full



employment and endemic poverty inevitable (Bowles and Gintis 1976; Wallerstein 1984; Klees 2016).

Rizvi (2017) also suggests that the current discourse of educational reforms, driven by a neo-liberal ideology, has resulted in the intensification of ‘social inequalities’ (Rizvi 2017, p. 10). He argues that globalisation while bringing ‘great benefits to most communities’, at the same time reinforces inequalities:

Global mobility of people, ideas and media has brought great benefits to most communities, but clearly in ways that are uneven and unequal. (Rizvi 2017, p. 12)

One of the effects of globalisation is that the higher education sector, having modelled its goals and strategies on the market-oriented and *entrepreneurial* business model, which reflects neo-liberal ideology, is compelled to embrace the ‘corporate ethos of the efficiency, accountability and profit-driven managerialism’ (Zajda 2015a, b). This necessarily produces both socially and economically stratified societies and education systems.

The dimensions of inequality and implications for social justice are due to the impact of privatisation/marketisation, and the rising inequity in the availability of funds among local education/regional authorities, because of differentiated economic and social differences between rich and poor regions. Regional inequalities in educational funding have an adverse effect on access to quality education. Some poorer rural regions are socially, economically and educationally disadvantaged, with little access to high-quality education. Current government policy of supporting best-performing schools, based on National examination results in secondary schools, will continue to have an ‘adverse effect on access to quality education for all in those regions’ (Dervin and Zajda 2020, p. 7).

From a critical theory perspective, globalisation has contributed to a new form of entrenched inequality and social stratification between the rich and poor economies (Milanovic 2005a, b, Milanovic 2006). The dimensions of social inequality are essentially due to the impact of capitalist economy, privatisation/marketisation, and the rising inequity in the availability of funds among local education/regional authorities, because of differentiated economic and social differences between rich and poor regions. Regional inequalities in educational funding have an adverse effect on access to quality education. Some poorer rural regions are socially, economically and educationally disadvantaged, with little access to high-quality education. Current government policy of supporting best-performing schools, based on National examination results in secondary schools, will continue to have an ‘adverse effect on access to quality education for all in those regions’ (Dervin and Zajda 2020, p. 7).

The above critique of globalisation, policy and education reforms suggests new economic, social and political dimensions of cultural imperialism (see Zajda 2015a). Such hegemonic shifts in ideology, affecting policy are likely to have significant economic and cultural implications for national education systems, reforms and policy implementations.



## Conclusion

The above analysis of education policy reforms, and the resultant social stratifications and inequality 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 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 (Milanovic 2006). Hence, we need to continue exploring critically the new challenges confronting the global village, in the provision of authentic democracy, equality, and social justice that genuinely promote an empowering and transformative learning and pedagogy. We need to focus on the crucial issues at the centre of current and on-going education reforms, namely equity, social justice and human rights, if genuine culture of learning, and transformation, characterised by wisdom, compassion, equality, and intercultural understanding, is to become a reality, rather than a policy rhetoric (Zajda and Ozdowski 2017).

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