

Conceptualising the Liberal Ideal: The Discursive Construction of Education in the Promotion of International Development 2000 – 2020

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Abstract

This thesis advances our understanding of the ideational drivers behind international education policy of the new millennium by taking an interpretive approach to the key policy documents. Discourse analysis is used to examine the main policy reports produced by the most influential bodies in this field, notably the World Bank and UN agencies, between 2000 and 2020. It finds that international education policy was discursively constructed as a grand narrative about the vision, process and outcomes of education in the promotion of international development. Yet the thesis argues that the dominant liberal model informing policy practices in this field was compromised by an overly simplistic one-size-fits-all approach to constructing the challenges and finding solutions in international education. To be specific, the analysis finds that the international policy realm was dominated by thinking grounded in economic liberalism.

This study questions the assumed harmony within the liberal model of international education, probing its broader notions of human perfectibility and liberal economic ideals associated with narrower market concerns. For the analysis reveals a grand narrative operating around a series of theoretically informed debates: over the vision of education as an economic or a social good; concerning the relative benefits of marketisation as opposed to humanisation in the process; and on outcomes, over whether the policies put in place rendered education a commodity or enabled the progressive realisation of the right to education. The liberal theory of international education is constituted by reference to the former pole of each of these binaries, whereas the latter is associated with critical perspectives on the liberal education model. It is this liberal model that underpins the international education policy practices examined in this study, the assumptions of which are deserving of much scrutiny and critical reflection. Applying a discursive approach to official reports and speeches lays bare the beliefs behind the liberal education model that these policy documents are associated with. In turn, this allows for a critical assessment of the liberal theory of international education, the assumptions behind which are considered flawed and urgently in need of attention.

Through a detailed analysis of the liberal education model, the thesis delivers a series of theoretical, methodological and empirical contributions: it helps us establish the case for taking a discursive approach to public and foreign policy research; it presents a unique interpretive discourse analytical method for investigating public policy dilemmas thereby showcasing the value of discourse analysis for international relations research; it identifies the weaknesses and possible solutions to seemingly intractable issues in international education, namely the challenges of providing equal access to high quality learning in poor countries amid economic and market-based tensions concealed within the liberal education model; and, it highlights policy recommendations to improve human wellbeing and security in less prosperous nations. The thesis concludes by considering how contemporary international education policy responses to Covid-19 have tended to reinforce trends identified between 2000 and 2020 towards a more liberal market economy model of education. More specifically, that responses to online learning have tended to support the interests of global education tech companies thus bolstering the prevailing aspects of the education model aligned with economic liberalism.

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Glossary

AVU	African virtual university
BIA	Bridge International Academies
BOND	British Overseas NGOs for Development
BRAC	Bangladesh Rural Advancement Committee
CDA	Critical discourse analysis
CESR	Committee on Economic, Social and Cultural Rights (United Nations)
CRC	Convention of the rights to the child (United Nations)
DfID	Department for International Development (UK)
DHA	Discourse-historical approach
EC	European Commission
EFA	Education for all
EMIS	Education management information systems
GEMR	Global education monitoring report
GMR	Global monitoring report
ICESCR	International covenant on economic, social and cultural rights
ICAI	Independent Commission for Aid Impact (UK)
IDA	Interpretive discourse analysis
IDC	International Development Committee (UK parliament)
IDS	Institute for Development Studies
IFC	International Finance Corporation
IFIs	International financial institutions
IMF	International Monetary Fund
IPA	Interpretive policy analysis
IR	International relations
IRI	Interactive radio instruction
LEAP	Learning and educational achievements in Punjab schools project
LFPS	Low-fee private schools
LLL	Lifelong learning
LWL	Lifewide learning
LOI	Language of instruction
MOOC	Massive open online course
NGO	Non-governmental organisation
NIECDP	National integrated early childhood development policy (S. Africa)
OECD	Organisation for Economic Co-operation and Development
OER	Open education resources
OHCHR	Office of the High Commissioner for Human Rights
OLPC	One laptop per child
PISA	Programme for international student assessment
PPP	Public private partnership
SABER	Systems approach for better results

SDG	Sustainable development goal
RPF	Rwandan Patriotic Front
UNCHR	United Nations Commission on Human Rights
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNGEI	UN girls' education initiative
UNHRC	United Nations Human Rights Council
UNICEF	United Nations Children's Fund
UPE	Universal primary education
USAID	United States Agency for International Development
VfM	Value for money
WDR	World development report

Introduction

International education matters. It matters for global institutions, it matters for the governments of aid donors and recipient nations, and most of all it matters for the underprivileged in poorer countries whose livelihoods are at stake. As of 2015, the challenges confronting international education were such that 264 million children and young people were not in school, with 53% of the lower and upper-secondary school age group not receiving an education (UNESCO, 2017: 118). This appears to flag up a policy puzzle around why efforts to promote international development through education are off course. The policies associated with this particular dilemma are underpinned by the liberal model of international education, the assumptions of which are believed to be open to criticism. A core aim of this thesis is to draw out this liberal model by conducting a systematic discourse analysis of the key international education policy documents between 2000 and 2020. This is done with a view to criticising and exposing the flaws concealed in the liberal model that prevented the field of international education from functioning as effectively and harmoniously as it might have done. The underlying assumptions of the liberal theory of international education are outlined in the first section of this chapter. It is also worth noting here that the terms 'liberal model' and 'liberal theory' of international education are synonyms and used interchangeably throughout the thesis. Returning to the abovementioned statistics, damning though this data appears, the dominance of the liberal doctrine remains virtually unquestioned by the bodies responsible for putting in place measures for change. This feeds into concerns over whether the liberal education model pushes policy solutions that rarely improve learning in poor countries, meanwhile allowing those in power to maintain the status quo in a manner that distracts us from the 'real' action that needs to be taken. All of this indicates a need to unpack the ideas and beliefs behind the liberal model of international education and decode meanings to better understand why the

efforts of international organisations and governments are wayward. Taking an interpretive approach manages this task and showcases the value of discourse analysis in global politics, particularly the Discourse-historical Approach devised by Ruth Wodak (2001) and refined by Michał Krzyżanowski (2010).

Education is central to the international development agenda and is a global priority for UNESCO and the World Bank, both key actors in the liberal model. Since UNESCO (1960) adopted the Convention against Discrimination in Education and the World Bank (1962) conducted its first education project on the financing and construction of secondary schools in Tunisia, education has remained key to social and economic progress in poorer countries. From the early-1960s onwards, multiple projects, policies, initiatives and institutional goals pushing for progress have generated a vast discourse on international education. Textual production intensified after the Education for All (EFA) goals were reaffirmed in Dakar at the World Education Forum in 2000 which accompanied the learning-focused objectives of the Millennium Development Goals (MDGs) aimed at achieving Universal Primary Education (UPE). The six timebound EFA goals to be met by 2015 led to increased efforts through Sustainable Development Goal 4 (SDG4) which drove the global commitment to provide access to quality education for all individuals into the post-2015 era, further expanding the wealth of official documents and commentaries. At the heart of this discourse is a body of empirical data produced by leading policy actors including international organisations and national governments. Surrounding and interacting with this core is textual data produced by charities, think-tanks, academics, journalists and other influential public figures that challenged or supported the official discourse and added to the narrative of how the liberal education model was discursively constructed.

It is important to stress at this point that the field of international education since the millennium, as at any point in its history, did not evolve in a political vacuum. Just as in earlier periods, education ought to be understood in its wider contexts of political turmoil and recognised as a critical international issue (Arendt, 1954). Various ongoing global contexts

interacted with the re-writing of the liberal model of international education as a narrative. From 2000 onwards, what became known as the 'War on Terror' formed a contextual backdrop in core policy reports as fiscal spending was directed towards military and security interests in the so-called 'failed states' of the Middle East. The displacement of people resulting from ongoing conflicts and numerous natural disasters that devastated low-income countries, the Indian Ocean tsunami of 2004 for instance, increasingly aligned development education with emergency response policies. But perhaps the most significant contextual factor of the period was the 2008 global financial crisis and its far-reaching consequences. Austerity measures imposed by the governments of major development aid donors further limited international development budgets and this clearly shaped the discourse in the lead-up to the EFA deadlines. Towards the end of the period of study, the context of introspective national politics evident through Brexit and the Trump presidency showed signs of shaping the discourse. Although the full impact of these more contemporary contexts, along with the effects of the Covid-19 pandemic, will need to be studied more carefully in future research (see conclusion chapter). In brief, the manner in which conflict and the financial crisis greatly influenced interpretations of issues and debates in the discursive construction of the liberal education model will become apparent as the narrative unfolds.

This study was inspired and motivated out of concern over the many tensions and struggles that exist within international education and the consequences of this instability for configuring policy debates. Initially, it was the critical response to the education policies of International Financial Institutions (IFIs), namely the World Bank and the International Monetary Fund (IMF), that proved compelling and prompted reflection on if or how these differences were preventing policymakers from achieving their aims (see Klees, Samoff and Stromquist, 2012). Another inspiration was the enormous wealth of documented evidence produced by institutional actors and how the field seemed to exist as much in text and talk as it did in political practice. The abundance of ephemeral 'buzzwords' frequently used when debating development issues was all too apparent and raised suspicion of double-speak (Cornwall, 2010). Ubiquitous yet slippery terms

such as 'partnership', 'accountability', and 'good governance' provide worthy examples. This consideration of ambiguous language and technical terms as signifiers that could conceal contradictions and ameliorate controversies unleashed a desire to investigate the power of words in international education. Acutely aware of the power of language in world-making, a sincere effort has been made to avoid taking meanings at face value. As Walter Rodney's (2018) study of the ideologically loaded term 'underdeveloped' has shown, the label can be perceived as demeaning when used to frame poorer countries as immature and deficient by contrasting them with advanced wealthy nations. In light of this, 'less-developed' or 'underdevelopment' terminology is purposefully avoided in the thesis to avoid falling into the linguistic trap of conjuring up disrespectful notions of backwardness.

1.1 The Liberal Theory of International Education

A major source of dispute in this study is the perceived harmony in the liberal model of international education. This section seeks to explicitly set out the underlying assumptions of the liberal model which underpin and provide the rationale for policy commitments articulated in the documents used in the analysis. The core argument is that liberal thinking behind the aspirations for education, the levers of power necessary for its effective governance and the ideas behind the policies put in place all contributed towards growing tensions that prevented international education from achieving optimum functionality. To clarify the assumptions of this liberal education model, on one hand we have the broader liberal ideas on human perfectibility as a wider concept, and on the other a narrower set of economic liberal ideals that align with enterprise capitalism. The first dimension refers to the liberal tradition on human nature and the perfection of people that developed out of early modern liberalism (Rousseau, 1979). Central to this philosophy was the faith placed in the power of individuals to flourish and realise their inner-potential. In other words, that humans are perfectible to the extent that they are capable of moral and technical progress, and indeed perfection.

The second element refers more specifically to the principles of economic liberalism and it is this aspect of liberal thought that will be mainly addressed in the thesis. Of relevance here are the broad set of economic policies driven by the UK and US governments and major IFIs that were applied to low-income countries from the 1980s onwards, commonly referred to as the 'Washington consensus' (Williamson, 1993). Faith in the market model with choice and competition as the preferred dynamics to guide and develop poorer countries were core notions advanced by this consensus. Applied to international education, the consensus vigorously promoted market forces as a key factor in delivering education to all capable of meeting the standards of quality, accessibility and equality. This liberal economic trend towards supporting lower-income nations can be understood in part as a legacy of the decision made by the US and UK to withdraw support from UNESCO in the mid-1980s. The subsequent withholding of financial support to UNESCO was partly an ideological response to operations directed towards the achievement of a New International Economic Order, with social justice and human rights at its core, which rallied against neoclassical economic principles endorsed by the US and UK (Coleman and Jones, 2012: 66). Both signatories had re-joined by the early-2000s, but this occurred in the context of conflict management as UNESCO reformed its operations in a struggle for legitimacy, confidence and budgetary capacity. At this point it should be clarified that this economic branch of the liberal theory of international education is not a neoliberal model as such, rather that it feeds into the neoliberal tendencies of actors that are restrained by social liberal ideals in the analysis. Fundamentally, this study discusses a narrow conception of liberalism consistent with economic globalisation that became wedded to neoliberalism. Critics of this aspect of the liberal education model tend not to present themselves explicitly as 'liberal' thinkers or otherwise, and it is by offering due attention to the importance of agency in the analysis that the nuanced positions of rival actors and their dramatic roles in constructing the narrative are foregrounded. The analytical chapters that follow can be considered both an elaboration on and in-depth treatment of this economic branch of the liberal education model.

1.2 Locating the Liberal Model in the International Education Literature

The underlying assumptions of the liberal education model and its contentious elements feed directly into the vast literature on education and international development and the wider context of capitalist relations. Fundamentally, interest in economic liberalism as the prevailing aspect of the liberal theory of international education means this study is closely connected to the literature on human capital along with associated academic debates over social capital and biopolitics.

Human capital has a long history (see Sweetland, 1996) and is the subject of much debate in the field of international education. It was originally conceptualised by economists as a model with which to study the relationship between education and factors of consumption and investment (Becker, 1964; Schultz, 1961). Becker (1964) famously claimed that human capital explained differences in earnings over time and between regional, household and individual wealth. Viewing education in this manner, economists refer to human capital on an individual level as the benefits immediately derived from income earned resulting from the skills and knowledge acquired, and the future earnings potential of gaining further knowledge and ability (Woodhall, 2001: 6951). In the more recent work of Becker (1996: 4), human capital is considered one significant element of a broader category termed 'personal capital'. Academics in the field of management have developed a wider definition of human capital that operates on the organisational level of the company or team and adds other characteristics such as politeness and punctuality to the resources (Ployhart and Moliterno, 2011). This points to linkages between human capital and the employability agenda in the liberal education model that occurred as part of a broader shift from macro- to microeconomics in the field of development with reform of the individual taking precedent over structural reform.

Educationalists, on the other hand, have traditionally taken a more social perspective on schooling prioritising the empowerment of individuals and development of strong civic values (Dewey, 1972). In the education literature, human capital has faced widespread criticism (see Little, 2003

for a full review). In their classic critique Bowles and Gintis (1975: 74-78) identified several weaknesses: Human capital wrongly classifies labour as a commodity; it totally ignores issues of class, power, social relationships, and cultural factors; it drags social institutions previously belonging to cultural and super-structural spheres into economic analysis. Fine (1999a: 413) builds on this criticism to argue that human capital has spearheaded a colonisation of the social sciences by economics (see Radnitzky and Bernholz, 1987; also Swedberg, 1990 for more detailed accounts of how the field of economics is exerting dominance over the social sciences). As an alternative to counteract this economic dominance, Fine and Rose (2001: 172) suggest that education is better conceptualised a 'system of provision', an approach conscious of market imperfections that views education provision as part of country specific socio-economic framework. The focus of this approach is both economic and academic: the building of schools; curriculum planning; a commitment to interaction of a social, political, economic and cultural nature; and, concerns over relations, processes and structures in the social arena (Rose, 2006: 175). Arguably one troubling factor in the focus on empowerment of the individual central to criticisms of human capital is that they simultaneously play into the individualist narrative of neoliberal economics and the retreat from the macro-structural concerns of the Keynesian model. The upshot being that in spite of challenges to the dominant notion of human capital, many continue to view education as an investment, and therefore as profoundly tied to economic liberalism.

Human capital is often referred to in relation to physical capital (i.e., land and machinery) and return on investment either to the individual through earnings or to society through growth in GDP. The case for investment in education was strengthened through studies by economists reporting that labour productivity as result of education increased national output at a greater rate than investment in physical capital (Schultz, 1961). As such, education has long been enveloped in the positivist research paradigm which dictates that statements of individual utility maximisation must be treated as hypotheses to be empirically tested and verified to understand underlying motivations (Friedman, 1966: 7). Considering education an

economic input has allowed governments and global organisations to justify their claim that education constitutes an investment opportunity (Psacharopoulos, 1985; Psacharopoulos and Woodhall, 1987). Proponents of human capital and the market model of education assert that rates of return are useful measures when performing cost-benefit analysis to inform education policy (Woodhall, 2001). These calculations have been used by researchers to convince policymakers to direct public spending into early years education. Diminishing social rates of return to education at the post-primary level provided sufficient justification for World Bank lending policy measures aimed at reducing public spending on higher education (Psacharopoulos and Woodhall, 1987: 55).

Measuring rates of returns and performing cost-benefit analysis to inform international education policy has proven controversial, further reflecting concerns over the growing dominance of metrics in the system governing the liberal model. Bennell (1996) assesses the relevance of using market-based indicators to analyse education in developing countries in the understanding that schooling cannot be considered a typical economic input like any other. Building on this criticism, Colclough (1996) proposes that schooling produces indirect benefits such as better health and nutrition and greater life expectancy which are not picked up in the rates of return literature. Stone (2012: 5) takes this argument further by rejecting the market model motivated by self-interest of which cost-benefit analysis is a tool. This is rejected in favour of a 'polis' concept of society formed around the notions of community and public interest. Such a reconceptualisation points to a more socially integrated perspective on education and positions human needs above those of markets. Just as human capital has proven controversial by way of drawing education into market economics, so too have social and political ways of thinking about global education.

In the context of this study the concept of human capital is closely associated with that of social capital. This is due not only to the contingent relationship that emerges between them in the literature on education policy, but also because of the similar criticisms levelled against them. There has been much disagreement over the definition and benefits of social

capital (Adler and Kwom, 2002). Notwithstanding, the most widely accepted definition is provided by Putnam (1993: 67) who describes social capital as 'features of social organization such as networks, norms, and social trust that facilitate coordination and cooperation for mutual benefit'. On the one hand, social capital generated by both aspirations within the family and external community factors contributes towards stocks of human capital by lowering school drop-out rates (Coleman, 1988: 118). On the other, schooling generates social capital by raising levels of trust and social cohesion in diverse societies (Gradstein and Justman, 2000). The structuring effect of social capital in this study is noticeable, for instance through the significance of social progress as a key element of the aspirations that actors held for education. Similarly, the deepening of democracy as a by-product of increased civic engagement generated by higher educational attainment filters into the narrative through the development of a secure and functional nation state and hopes for greater levels of social inclusion (Milligan, Moretti and Oreopoulos, 2004). In terms of education policy effects, these social motivations also have deep implications for the diverse forms of provision through which schooling is offered, both publicly and privately. That said, social capital has been criticised for falling victim to the same institutionalised fate as human capital. Fine (1999b) argues that the World Bank's willingness to embrace social capital is further evidence of the colonising effect of economics in the promotion of rational individualism and utility maximisation principles. The author further demonstrates that social capital is being used by colonisers as a sphere in which human capital and other types of personal capital are analytically applied (Fine, 1999a: 414). Taken together with the other critical perspectives discussed above, this raises further concerns over the power relations that structure education provision in low-income countries.

Ongoing debates centred around human capital overlap considerably with interest in education as a means of controlling the behaviour of a population. The relationship between the actions of the state and the power that it wields over its subjects were first introduced through the Foucault's (2004: 243) notion of biopolitics. Foucault (2010: 268) argues that the biopolitical paradigm comes into being as neoliberal states actively support the

colonisation of the social by subjecting all objects, beings, and domains of behaviour formerly beyond the reach of the market to forms of economic analysis. From this process emerges Foucault's emblematic figure of *homoeconomicus*, defined by Dilts (2011: 1) as 'a subject of governmental rationality serving as a grid of intelligibility between the government and the governed'. The domain of biopolitics is clarified through Foucault's (2007: 16) concept of 'biopower' which considers the inherent imbalances within the biopolitical realm as rulers devise strategies to gain from the innate qualities of the ruled. Building on this, Foucault (1978: 140-141) formulates a politically strategic role that public bodies including schools play in subjugating members of society to the economic processes that drive the capitalist systems of production. Nonetheless, biopolitics has not escaped the critical posturing of political theorists. Fraser (1998: 28) appraises the normative dimensions of biopower by proposing that Foucault does not take a neutral standpoint and is not equipped to provide concrete answers about his position. Another line of criticism suggests that biopolitics is constrained by the structuralist roots of Foucault who, it is asserted, would struggle to identify the source and explain the dynamics driving the paradigm (Hardt and Negri, 2000: 28). In spite of these challenges, the notion of biopower says much about the political control it imposes on social subjects to play an active role in the economy without protest. Furthermore, it also positions these relations of power as a mediating factor in the debates over the economisation and commodification of education in poorer countries concealed by the taken-for-grantedness of the liberal education model.

1.3 Contribution and Justification

This study is significant in that it enables us to better understand how the liberal model of international education was discursively constructed as a grand narrative. In theoretical terms, it is hoped that this study will demonstrate how a unified theory of discourse can provide powerful insights into questions of public and foreign policy, particularly those pertaining to international education. Of particular importance is the way in which, among others, poststructuralism and critical theory, both alternative theories of international relations (IR) with an appreciation of discourse as a form of

social action, inform discourse analytical approaches capable of lifting the lid off policy issues obscured by dominant liberal thinking. Taking a discursive approach to public and foreign policy dilemmas is of value since it questions the very nature of positivist/empiricist mainstream policy research and its philosophical assumptions by demonstrating that the discourse method provides a credible alternative for resolving policy puzzles.

In terms of methodological importance, this study makes a significant contribution to interpretive IR research. Interpretive Discourse Analysis (IDA) is introduced as an approach specifically tailored to understanding policy puzzles challenging education in the promotion of development in poorer countries. Taking up the interpretive baton, this thesis develops the linguistic turn in public and foreign policy studies by contributing to a growing body of research rejecting the notion that only positivist empirical work based on observation or experiment that produces quantitative data can deliver explanatory findings deemed rigorous enough to inform political decision-making. Given its enormous literature and wealth of buzzwords, international education stands out as a policy area that lends itself particularly well to an interpretivist approach. Assuming this methodological stance leads us to a further significant aspect of the study: It analyses the evolution of international education in its historical and theoretical context. Drawn from a detailed and historically contextualised analysis of key policy documents and wider literature from related discourses, the grand narrative will reveal normative ruptures in the recent history of international education policy that have previously gone unrecognised by natural science models focused on causal modes of explanation, and which could be brought to bear on the direction of future policy making.

In empirical terms, this study furthers our understanding of research into public policy dilemmas on several levels. Firstly, drawing on discourse theory it uniquely constructs the taken-for-granted liberal model of international education as a grand narrative. The results are of importance since they uncover a conflicted version of reality that differs from the perceived harmony of the liberal education model, to which there is arguably no alternative, and they speak to extant literature in the field.

Revealing the cleavages and disunities within this liberal model represents an initial step towards resolving these seemingly intractable disputes, insofar those tensions are possible to address within existing international structures. Secondly, the analysis provides a platform for underrepresented perspectives that recognise learning as a fundamental human right and argues that failures to treat education as such could be labelled a manmade crisis of societal development in many parts of the world. In this sense, there is an element of immanent critique to the analysis given that, while international bodies and institutional goals are concerned with the right to education, they simultaneously tend to reproduce underrepresentation. Thirdly, this study shines a light on the discursive relationship between domestic and international education policy by exploring how ideas were interdiscursively spread and recontextualised across different scales of governance within the epistemic community. It should be clarified here that the focus of this study is not causal relationships between the policies of national governments and those of global institutions. Whilst the author is aware of research into policy networks that tracks causation along these lines (see Marsh and Rhodes, 1992), causality and issues of dominance between the national and global levels of education policy are considered beyond the scope of this study. Finally, empirical findings pick up aspects of policy continuity and change, reflecting how the ebb and flow of ideational factors evolved over the arc of the grand narrative. Through a deep excavation of policy reports, speeches, media coverage and academic works, it will become clearer how the battle of beliefs contributed to certain elements of international education policy being maintained or altered over the twenty-year period. Drawing on a wide empirical resource, the thesis aims to answer questions concerning how the liberal model of international education was discursively constructed. Discovering the answer will add to the significance of the study since unmasking these complications and shifts may offer significant policy recommendations and demonstrate the potential relevance of findings on the impact side for communities of interest, including international organisations.

Furthermore, this thesis makes a novel interdisciplinary contribution to the emerging body of extant literature that brings together strands from

international relations, education and discourse studies. Of course, concepts of development have long overlapped with education dating back to the notion of 'Bildung' and early thinking about human, social and economic development through learning (Bruford, 1975). However, this study builds upon the growing body of contemporary research by discourse analysts who have investigated education dilemmas in the context of international development (see Vavrus and Seghers, 2010; Nordtveit, 2012; also McCormick, 2012). Another unique feature is the focus on issues of structure and agency that come to the fore when conceptualising the liberal education model. Most critical studies investigating international education tend to emphasise its systemic nature and pay scant attention to how the beliefs, values and norms of actors are shared or challenged within the discourse. Recognising the importance of the structure-agency relationship in policy analysis provides the scope for an agent-centred discourse analysis that tracks the effects of structures on agency, as well as vice versa. The analysis is essentially theory-driven and draws upon models from associated disciplines by synthesising them with empirical evidence in fundamentally different ways. Lower-level theories comprising the economic ideals of the liberal international education model, together with polar criticisms of these positions, establish the binaries that inform the analytical scenes in each act of the grand narrative. Argumentative and representational constructs in the discourse connected to topics explain how agential beliefs shaped political reality in each part of the narrative. For instance, the final analytical chapter draws on the theoretical context of education as a commodity to provide grounding to how actors represented the unique and often contradictory outcomes of the liberal education model in poor countries.

1.4 Main Arguments and Background to the Analysis

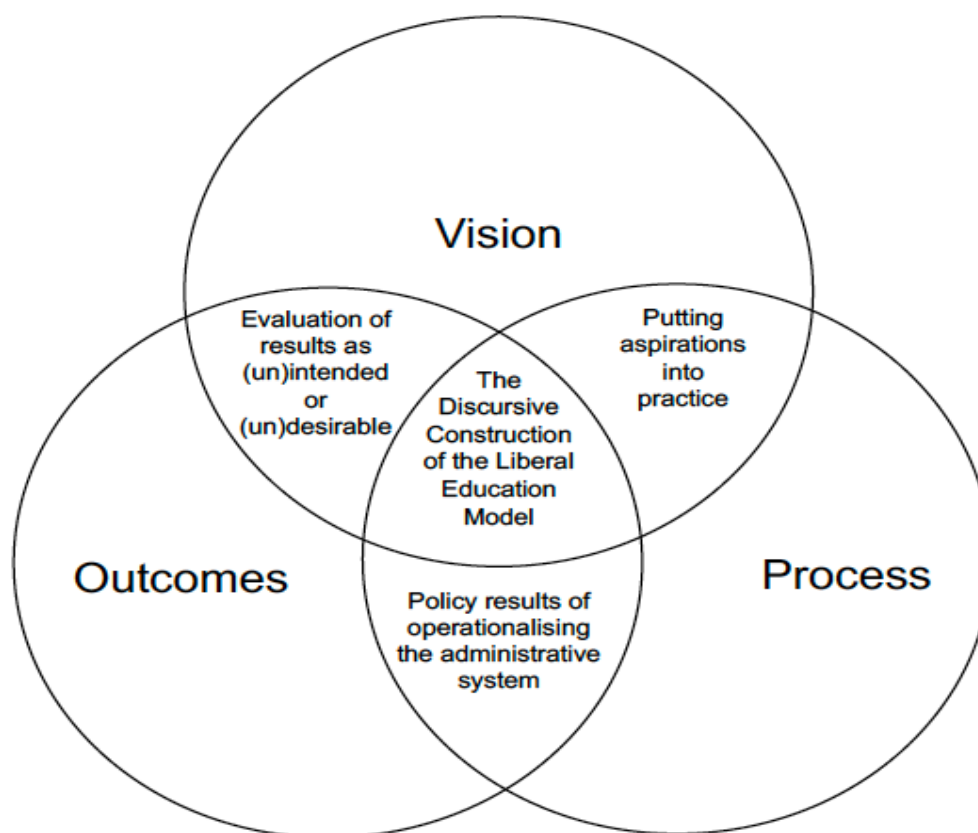
Supported by a unified theory of discourse, this study showcases the IDA approach that combines aspects of established discourse methods in a way that enhances their potential to interpret policy dilemmas. IDA is applied to a range of policy documents and case-related texts following six systematic analytical steps. The core argument of this thesis is that the liberal model of international education was discursively constructed as a narrative

framework along three interlocking themes, referred to in this study as acts, that follow the plot of a quest (see figure 1). In line with narrative theory, thematically arranging a set of events moving from vision to process and on to outcomes is amenable to narrativising a 'completed story' (White, 1973: 7). The narrative opens with the *vision* actors had for education leading to the *process* behind turning those aspirations into reality and concludes with the (un)intended and (un)desirable *outcomes* produced by those mechanisms in the education system. Forming the first part of the analysis, the *vision* refers to the diverse aspirations of actors and explores many of the problems and obstacles preventing the enactment of those preferential realities. The theme of the second analytical chapter is the *process* behind achieving those aspirations and removing barriers. Examining the process entails seeking answers to questions that agents asked themselves: What are we doing to achieve this vision and what do we want to do? The final analytical chapter thematically explores the *outcomes* of these processes. Outcomes refers to the (un)intended and (un)desirable results produced by those mechanisms in the administrative system governing international education.

Narrativising the analytical chapters through these three acts serves as an organisational framework and heuristic device for the body of the thesis. But this labelling of analytical chapters as 'acts', and subsequently chapter sections as 'scenes', adds to the novel contribution of the study in other important ways. Firstly, by using these labels this study prompts the reader to think about taken-for-granted political language and terminology. In this way, these terms deliberately give the reader a sense of what it is like for communities to be confronted with policy buzzwords and the alienation effect they produce. For instance, international education buzzwords such as 'lifelong learning' tend to go unquestioned in the liberal model but are often incongruous to poorer countries adopting policies that come under its mantra. Understandably, this labelling of chapters as 'acts' may cause irritation or annoyance to the reader, but it does so in the same manner that policy buzzwords such as 'accountability' and 'school-in-a-box' annoy those struggling to adopt liberal international education policies in poorer countries. Secondly, the terms 'act' and 'scene' have as much to do with

drama and a dramaturgical notion of society as they do with storytelling. For acts and scenes in the narrative imply the crucial role of actors too. Taking this approach forces us to consider the linkages between politics and theatre in that policy audiences are participants in the narrative rather than passive bystanders. This central role that actors play in determining the arc of the narrative also connects to and reinforces the prime role of agency in this study.

Figure 1. Interlocking analytical themes that form the grand narrative.



Another necessary aspect of clarification concerns the theoretical context informing the analysis and how this maps onto the grand narrative complete with its accompanying acts and scenes. Each act is shaped by a lower-level theoretical debate organised around a binary, with one pole of each binary comprising the liberal theory of international education. The scenes in the vision act are informed by tensions over whether education amounted to an economic or a social good, the former pole supporting aspirations for education as an investment in wealth creation. In the process act, disagreements over the relative benefits of marketisation and humanisation

as the best procedure for achieving the vision shape the plot. The marketisation end of the binary complements the governance ideals of performance and results promoted by economic liberalism. In the outcomes act, scenes address issues concerning whether the policies put in place rendered education a commodity or advanced efforts towards the progressive realisation of the right to education. The former pole supports liberal modernisation beliefs that consider the cultivation of an international education industry providing marketable goods or services as evidence of attaining the highest stage of growth. In the three acts of the narrative, the liberal education model is constituted by reference to the economic pole of each of the three binaries, whereas the opposite poles represent critical perspectives aligned with humanist or anti-neoliberal values that seek to weaken the dominance of free-market beliefs in the liberal deal. Indeed, a key de-stabilising factor of the liberal model elicited by the analysis concerns how these sets of binaries tended to work against each other over the course of the narrative

A further area of clarification needs to be made with regards to the agential leanings of actors who formed the core policy discourse. Agential leanings are of importance in the analysis since they highlight power relations embedded in the discourse. Global institutions, national governments and their development agencies comprise the leading roles and the positions they took up were instrumental in structuring the liberal education model. UNICEF and the UN Commission on Human Rights (UNCHR), replaced by the UN Human Rights Council (UNHRC) in 2006, held somewhat stronger humanistic views on education. In the policy discourse, they tended to support education as a public good that empowered both individuals and communities. They also promoted the right to education in association with the conventions and treaties of international human rights laws. Inequalities resulting from acts of discrimination and marginalisation of the disadvantaged associated with the marketisation of education were a major cause of concern for the UN agencies, as was the commodification of learning. In contrast, the World Bank and OECD leaned more towards an economic and market-oriented approach to international education. Their core policy documents were complementary in that both organisations

envisaged education as the accumulation of knowledge and skills to increase personal wealth and generate economic development. Both embraced the principles of managerial processes that prioritised performativity, achieving results and efficiency as key to the effective running of the administrative system of international education, with the right to education set aside as a secondary concern.

Taking up the ostensibly neutral, or small 'l' liberal, territory between these agential camps was UNESCO. Following the Dakar reaffirmation of education goals in 2000, the EFA Global Monitoring Reports (GMRs) were produced annually to assess progress towards targets by drawing upon background research and other studies by academics and civil society groups. From 2016 onwards, the series was re-titled as Global Education Monitoring Reports (GEMRs) to indicate its new role in tracking progress towards SDG4. These reports reflected what could be described as a 'liberal consensus' in the international education discourse, simultaneously promoting education as a human right without denying its status as an economic good. Public education reforms to incentivise better performance were supported but these were to be respectful of international human rights legislation and cautious of privatisation. GM(E)Rs sought to shield poorer nations from the worst policy outcomes emanating from IFIs and the development agencies of major donor nations while encouraging the spread of Western innovation and best practice. In addition to the positions of agents in the core policy domain, supporting actors with their own leanings contributed by adding weight to these perspectives in the discourse. The work of academics, NGOs, think-tanks, lobby groups and research consortiums challenged, supported and influenced institutional leanings in the intermediary field of discourse. External to these spheres of discourse, but nonetheless influential, was the supporting role of media-based actors in the peripheral field of discourse who provided a cultural commentary and participated in shaping the grand narrative.

1.5 Research Questions

This study aims to reveal how the prevailing liberal education model was discursively constructed as a narrative comprised of three acts. By

uncovering the conflicts and strains obscured by the dominant liberal doctrine, it seeks to highlight aspects of policy continuity and change from 2000 to 2020 and offers a means of initiating resolution to resolving these tensions. The key research questions this thesis seeks to explore, and which guide each act of the grand narrative, are as follows:

- What kind of vision drove the global education agenda between 2000 and 2020?
- How did actors discursively construct the administrative system governing international education?
- What were the ideas behind the international education policies put into practice and the evaluations of policy outcomes?

1.6 Structure of the Thesis

This thesis proceeds in a well-recognised form and begins with a chapter setting out the theoretical framework in support of the discourse method as an effective approach to better understanding the policy puzzle facing the liberal model of international education. A review of the literature details the origins, contribution to discourse studies and critical debates around four compatible discursive theories: poststructuralism, post-Marxism, normative-deliberative theory and critical realism. It argues that although distinct in their assumptions, the differences between these theories are reconcilable. This is followed by an explanation of how narrative theory further complements this ensemble. It concludes by advancing the case to assemble these perspectives into a unified theory of discourse supportive of an anti-positivist research agenda towards the understanding and resolution of foreign and public policy dilemmas.

Having laid down the theoretical groundwork, the thesis subsequently turns to an explanation of how the analysis will be conducted. Chapter three sets out the methodology and establishes the analytical and conceptual framework that advances the case for interpretive and discursive policy research which diverts from the covering-law model sacrosanct to the natural science methods. Fundamentally it introduces and presents IDA, a fresh analytical approach for interpreting the construction and resolution of

policy dilemmas in the field of international education. Background is provided on the case material used and a series of systematic steps followed to apply IDA to the empirical data are outlined. The analytical stages from the pilot study through to the methodological refinements will be detailed as explicitly and transparently as possible thus providing a practical tool-kit for IDA. Following an overview of the methodological challenges that face discourse researchers who are held to account by quantitative criteria, a set of alternative evaluative standards more relevant to judging the quality of interpretive qualitative analysis will be presented.

The three chapters that follow present the analysis by narrating the vision, process and outcomes. These broad themes each represent an act in the grand narrative of how the liberal model of international education was discursively constructed. The plot of each act unfolds through five scenes, or analytical topics, that emerge from lower-level theoretical debates. Act one opens the narrative by exploring the aspirations actors had for education. Informed by a debate over the extent to which international education constituted an economic good, the vision is narrated through the following scenes: economic prosperity, social progress, human development, inclusion and national security. This act reveals a gradual weakening of the economisation of education as individual and national wealth priorities were continually challenged in the discourse by social and humanist concerns. The second act investigates how the vision was made use of by analysing the most significant parts of the process driving the administration of international education. Born out of disputes over the marketisation of education, five scenes guide this act: value for money, partnerships, accountability, governance by measurement and evidence-based policy. The process act exposes how humanist-leaning actors fought (often in vain) to discredit dominant commercial beliefs by convincing others that all parts of the process existed to serve human needs rather than markets. Act three concludes the grand narrative by investigating the outcomes produced by this process in terms of the beliefs behind policy decisions and the ideas that shaped evaluations of the actual policies put in place. Informed by debates over the commodification of education, the outcomes act is narrated through the scenes of lifelong learning, lifewide learning, low-fee

private schools, language of instruction and philanthropy. The outcomes act chronicles how the effects of practical policies enacted in the liberal education model were not spared any less disunity and fragmentation than the vision and processes that led them there, revealing a discursive struggle by rival actors to expose or remedy the distortions that beliefs about learning as a commodity had on the education and livelihoods of the underprivileged in poorer countries. Each act concludes with a summary identifying the discursive shifts that emerge from the analysis and indicating instances in which norms were noticeably reinforced or diminished in the narrative. It is these shifts that feed into broader policy patterns and trends presented in the final chapter.

The conclusion brings these analytical strands together by first providing an overall plot summary of how the liberal education model was discursively constructed as a grand narrative. Drawing on the discursive shifts elicited in each act of the analysis, it outlines the key aspects of policy continuity and change that occurred in the field between 2000 and 2020. These findings are used to direct a series of policy recommendations that hope to guide the reconciliation of the conflicted liberal model. Following a suggestion of avenues for further research, the chapter wraps up by considering the implications of these findings for global education policy in the context of contemporary challenges that were either cut off by or proceeded the closing of the grand narrative.

Theoretical Issues

The previous chapter outlined how the values and beliefs of agents that shape institutional structures are key to understanding and resolving disputes in international education. To investigate these ideationally charged tensions, this thesis applies a discourse analytical approach to policy documents produced between 2000 and 2020 to explain how the liberal model of international education was discursively constructed as a grand narrative. This chapter outlines the theoretical framework in support of applying an interpretive discourse analysis to better understand not only this specific policy dilemma facing international education, but also public and foreign policy puzzles more generally. In this sense, the discursive issues discussed are mainly philosophical and intimately related to alternative branches of IR theory associated with the concept of discourse, notably poststructuralism and critical theory. In spite of some references to the interplay between discourse theory and analysis, which is virtually unavoidable when engaging with discourse studies, the focus here is intentionally theoretical with analytical issues dealt with in the following methods chapter.

This chapter argues in support of a unified theory of discourse, the preferred theoretical framework for this study, that furthers the anti-positivist agenda in policy research and provides firm theoretical grounding for conducting an interpretive discourse analysis. The first section outlines and discusses issues concerning four distinct yet relatedly compatible theories of discourse: post-structuralism, post-Marxism, normative-deliberative theory and critical realism. Section two introduces narrativity as a complementary supplement to the construction of a unified theory of discourse. It outlines how narrative theory not only builds upon the anti-naturalist assumptions of these discursive theories, but also provides justification for presenting the analysis in a narratological format and foregrounding a dramaturgical

perspective. Before summarising the chapter, the final section brings together these issues to advance the case for a unified theory of discourse that stands against natural science methods. The argument put forward is that discursive theories combine to forge an interpretive and discursive research agenda in politics and IR that can be effectively applied to better understand the dilemma facing international education.

2.1 Congenial Theories of Discourse

This section surveys the literature on the poststructuralist, post-Marxist, normative-deliberative and critical realist theories of discourse. The coverage outlines their origins and traditions, contribution to the field of discourse studies, the critical debates surrounding them and a brief overview of how each theory has justified its direct application to empirical issues. Irrespective of their contrasting characteristics, these four theories can be considered highly complementary in many respects.

2.1.1 Poststructuralism

A crucial component of the unified theory of discourse, poststructuralism is firmly rooted in constructivist thinking. Poststructuralists accept Berger and Luckman's (1967: 20) hypothesis that although we perceive an objective reality, in essence we live in a socially constructed world in which actors co-construct meaning in order to make sense of everyday life. Dismissive of structuralist linguistics, poststructuralism transcends Saussure's (1966: 66) signification model based on a direct relationship between signifiers (sound producing utterances) and the signified (concepts). A debt of gratitude is owed to Derrida (2001: 352) who, critical of the theoretical and methodological shortcomings of structural linguistics, questioned a fixed set of meanings to declare infinite 'free play' in a sphere where 'everything is discourse'. Derrida's critique proved a precursor to the first phase of Foucault's development of the archaeology of discourse.

Discourse theory is indebted to the evolutionary leaps made by poststructuralism. In his archaeological studies, Foucault (1972) sketches an autonomous system of discourse and an apparatus to describe its social function. Archaeology provides a framework for investigating meaning in a

given historical period. However, Howarth (2000: 61) explains that this early attempt at a poststructuralist theory is flawed due to its high levels of ambiguity, the weak relationship made between discourse and social reality and its unjustified connection with the field of politics. Fundamentally, the theory prioritises knowledge but misses issues of power relations in discourse. For instance, if the archaeological approach were directly applied to a public policy dilemma it would make discursive change impossible since actors would agree that certain policy measures were important, but this wouldn't be transformed into political reality. In *Discipline and Punish* (1995) and *The History of Sexuality* (1978), Foucault develops poststructuralism through his genealogical approach. One thing common to these models is that they both demonstrate discontinuity and changing meanings in discourse over time. However, they are different in that the genealogist is a diagnostician who focuses on the relationship between power and knowledge in contemporary society. As Foucault (1978: 100) differentiates, discursive events are not simply dichotomous in terms of being for or against, but are complex requiring an understanding of both what is said and unsaid whilst paying attention to hierarchies, power relations and contexts. This is supported by Goffman (1986), who views discourse as an exercise of control whereby power and meaning become one. For example, applying genealogy to the analysis of a public policy issue would allow power relations to reveal *why* certain political beliefs were not an objective reality. It is through highlighting power as practice that poststructuralism has made such a significant contribution to discourse theory.

Critiques of poststructuralism, both populist and substantive (Howarth, 2013: 56-86; Torfing, 2004: 17-21), have prompted much reflection among its proponents. Popular criticisms include Wheen's (2005) polemical work that lampoons poststructuralism as a delusional post-modern project. However, examining a few of the more substantive challenges prompts a less obtuse consideration of its weaknesses. Among the cruder academic criticisms, Giddens (1987: 195) claims that poststructuralism is a dead theory that failed to live up to its revolutionary expectations in the social sciences. A more detailed critique by Taylor (1989) argues that

poststructuralists have a tendency towards subjectivism. His claim against Foucault and Derrida is that 'Both want to disclaim and notion of the good [but] what they end up celebrating instead ... is the potential freedom and power of the self' (Taylor, 1989: 488). Against this, Dreyfus and Rabinow (1983: 120) rightly point out that Foucault's writings on genealogy place importance on locating the subject and subjectivities within technologies of power. Discourse is a site of struggle whereby on the one hand actors jostle to gain control over discourse production, and on the other they use discourse as an instrument of power. To re-emphasise an earlier point, giving attention to power struggles also foregrounds cultural and historical contexts. Ways of thinking are historically contingent as ideas and beliefs from the past shape the discourse and present-day reality. In brief, Foucault aims to 'construct a mode of analysis of those cultural practices in our culture which have been instrumental in forming the modern individual as both object and subject' (Dreyfus and Rabinow, 1983: 120). Philosophical beliefs also play a part in this debate since, whereas Taylor is a hermeneutical thinker, poststructuralism leans towards the phenomenological tradition. Challenging the theory on philosophical grounds, Habermas (1987a: 276-293) argues that poststructuralists are irrational in their challenges of illegitimate structures of power due to the discrepancies between performance and proposition in their reasoning. This is refuted by Howarth (2013: 77) who points out that this claim of a 'performative contradiction' is exaggerated, arguing it to be 'too rigid and exacting as a tool for dismissing many poststructuralist perspectives'. Habermas (1987a: 266-276) also questions the lack of attention given to the logic of resistance and the establishment of spaces for opposition groups to liberate themselves from power structures. This omitted response to domination has to be conceded as an unanswered question in Foucault's genealogy.

Notwithstanding these disputes, the application of poststructuralist theory to better understanding power struggles is testament to its continued relevance in understanding political dilemmas. Spivak (1988) applies poststructuralism to the post-colonial context to argue that global capitalism and neo-imperialist power formations construct subject positions. This

study also illustrates the contingent role of Western experts in the subjectivity of subaltern classes in the third world as passive actors. In her investigation into anti-whaling discourse, Epstein (2008) draws heavily on poststructuralism in ways previously unrecognised in the field of IR. As the Epstein (2008: 4) puts it, 'these two key elements of social life, power and meaning, are fundamentally intertwined.' Ball (2010a) applies poststructuralism to understand power struggles in the reform of education in the UK context, in particular the way professionalising discourses instituted techniques of managerialism in British schools. Having discussed poststructuralism, let's turn our attention to a related and Marxist-inspired philosophical foundation of discourse studies.

2.1.2 Post-Marxism

The inspiration for a post-Marxist theory of discourse was the work of structural Marxists: Althusser (1984), who emphasised ideology in social theory; and Volosinov (1973), whose studies developed the significance of ideological and linguistic signs. A combining of structural Marxism with poststructuralist insights marks the point where the notion of discourse became accepted as a means of bridging the link between historical materialism and linguistics (Pêcheux, 1982: 18). Post-Marxists build extensively on Gramsci's (2005) concept of hegemony. In *Hegemony and Socialist Strategy* (2001), Laclau and Mouffe pull these strands together to develop a comprehensive post-Marxist theory of discourse. This major work draws interpretatively on the hermeneutic tradition and applies discourse theory to political problems in order to uncover conditions of meaning and identity as an alternative to a positivist focus on objectivity (Torfing, 2002: 54).

Post-Marxists contribute to discourse theory in several key ways. Firstly, they prompt us to think not only about ideologies, but also ideological effects. As Purvis and Hunt (1993: 491) illustrate, Laclau and Mouffe break from the notion of ideologies as preconceived ideas to be wielded as weapons by political actors in class struggles. Rather, it is the emergence of ideologies and discourses which combine various elements with no pre-given political importance that give a discourse its ideological effects (Purvis

and Hunt, 1993: 492). Secondly, post-Marxists take up a unique position by putting aside the distinction between discursive and non-discursive political practices. As Laclau and Mouffe (2001: 107) put it, 'every object is constituted as an object of discourse, insofar as no object is given outside every discursive condition of emergence.' This creates conditions for dislocations of meaning insofar as there is never a word that one-for-one describes a social or political practice. The authors developed a range of discursive concepts to describe these ruptures. That there is no total fixity of meaning gives way to *subject positions* (Laclau and Mouffe, 2001: 109) which determine meaning while closing the gap between possible meanings. Meaning and identity emerge through the process of *articulation* (Laclau and Mouffe, 2001: 105) or, a battle over meaning between subjects through in speech or text. Although meaning is constantly negotiated, Laclau and Mouffe (2001: 112-3) explain how partial fixation occurs through *nodal points* (reference points that emit meaning, e.g. democracy) which, for their lack of closure, are challenged by *empty signifiers* (terms that have no concrete meaning, e.g. threat to the regime) that attempt to challenge the nodal point with conflicting meanings. Partial fixations are of hegemonic significance since 'Discourse and the identities produced through them are inherently political entities that involve the construction of antagonisms and exercise of power' (Howarth and Stavrakakis, 2000: 9). As will be explained later, these concepts also allow post-Marxist discourse theory to be practically applied to interrogate a range of political dilemmas.

As with poststructuralism, post-Marxists are no stranger to criticism. Howarth (2000: 111-124) surveys a number of challenges to Laclau and Mouffe's theory, both philosophical and substantive. Firstly, we begin with the philosophical claim that 'everything is discourse', which led to accusations of idealism. Jessop (1982: 200) suggests that the theory gives insufficient attention to how extra-discursive conditions are mediated through discourse and their unintended structural effects. Post-Marxists counter this claim by clarifying their position on objectivity. In defence of Laclau and Mouffe, Howarth (2000: 112) argues that they 'do not deny the existence of a reality external to thought' but contest 'the possibility that these real objects have a meaning independently of the discourses in which

they are constituted as objects.’ A second and related philosophical criticism characterises post-Marxist theory as relativist. Geras (1987: 67) asserts that an objective reality and an extra-discursive realm are the prerequisites of rational enquiry and meaningful communication. In his words, ‘This foundation once removed, one simply slides into a bottomless, relativist gloom, in which opposed discourses or paradigms are left with no common reference point, uselessly trading blows’ (Geras, 1987: 67). Nonetheless, Howarth (2000: 113-4) correctly indicates that this claim of relativism contains a number of philosophical issues which, when unpacked, reveal a fundamental misunderstanding of post-Marxist theory concerning the relationship between language and social reality, the socially constitutive nature of discourse and the interpretive choices faced by discourse theorists.

Moving on to the substantive criticisms levelled against post-Marxists, the first concerns the conception of society presented in Laclau and Mouffe’s thesis. Returning to Jessop (1982: 198), one argument is that, when analytically applied, the theory is ill-equipped to understand how capitalist institutions and organisations shape social relations. Howarth (2000: 120) skilfully refutes this by explaining that discourse theory does not treat institutions as unified, untouchable subjects but as temporarily stabilized discourses which, although insulated within hegemonic practices, are open to challenge from rival discourses. The second substantive criticism is targeted at post-Marxist understandings of structure and agency. Rustin (1988) states that Laclau and Mouffe’s theory is voluntarist and subjectivist as it downplays the role of political structures in support of an arbitrary human agency. Yet Laclau and Mouffe reject analytical approaches based on self-maximising subjectivity such as rational choice or approaches in which actors merely reproduce existing political structures (Howarth, 2000: 121). From this perspective, Rustin’s voluntarist critique misses the point of how human action occurs as a result of their contingent relationship with discursive structures that shape identity and meaning (Howarth and Stavrakakis, 2000: 13).

In spite of their well-recognised application difficulties (Howarth, 1998: 288), the discursive concepts of post-Marxism have been fruitfully applied

to a range of political issues by scholars associated with the Essex school of discourse theory. Hansen and Sørensen (2004) draw on Laclau and Mouffe's approach to investigate the discursive construction of local governance and institutional reform in Europe using two local Danish cases. The theory has also been applied to political dilemmas in low-income countries. Burgos (2000) uses Laclau and Mouffe's insights into subjectivity to understand the logic of the Mexican revolution by providing an account of the rebel social movements and their agential role. Harvey and Halverson (2000) draw on partial fixations of meaning in their study into the effects of the Zapatista movement on the Mexican consciousness. Another significant dimension of discourse theory can be traced back to the work of critical theorists.

2.1.3 Normative-deliberative Theory

The normative-deliberative theory of discourse has its origins in first generation critical theory and the Frankfurt school of philosophy. These developments were influenced by Horkheimer and Adorno's book *The Dialectic of Enlightenment* (1973) which critiqued instrumental reason in a post-war age of domination characterised by the perceived devaluation of individuals and the commodification of language and opinion. These themes of control and communication are central to the normative-deliberative theoretical approach. As Dryzek (1995) points out, where critical theory was dismissed as obscure and unscientific by empirical scientists, the communicative-turn of Habermas enhanced its impact.

Several of Habermas' theoretical constructs contribute towards normative-deliberative theory and support its relevance to discursive political inquiry. Norms and beliefs encoded in language are central to the concept of communicative action developed in the work of Habermas. As Seidman (1989: 17) explains, construct validity claims are raised through language used in interaction between participants in deliberation over what should be considered norms and in the best interests of all. To clarify, validity claims could entail agreement, which creates closer relationships between actors and the outside world, or argumentation, wherein ideas about the world are challenged and negotiated to restore collective understanding (Seidman, 1989: 17). At the heart of this communicative exchange is the notion of

coercion, or unforced agreement and submission to dominant norms. Deliberative action is played out in Habermas' conceptual realms of system and lifeworld which establishes patterns of intersubjective interpretation. Lifeworld is a domain in which interlocutors 'reciprocally raise claims that their utterances fit the world, criticize and confirm validity claims and settle disagreements' (Habermas, 1989: 171). Systems, on the other hand are described by Seidman (1989: 19) as loosely formed living environments that simultaneously shape and are shaped by processes of exchange that establish the lifeworld such as capitalist markets and administrative bureaucracies. The extent to which there is an imbalance in the modernised world points to a phenomenon known as 'colonisation of the lifeworld' in which market and state intrude on individual liberty (White, 1995: 8). Taken together, these dynamics are observable through the ways in which states and multilateral institutions achieve collective understanding and agreement. As Cox (1983: 172) accurately points out, global institutions act as mechanisms through which dominant norms control the global political order. Institutions achieve this when they embody norms that reproduce hegemonic formations, play ideological roles in legitimising these norms, co-opt talented elites from less-prosperous countries, and neutralise counter-hegemonic thinking (Cox, 1983: 172-3).

Normative-deliberative theory as presented in Habermas' model of communicative action has too received its share of criticism. One widespread critique dismissed the theory as 'a hopelessly idealistic undertaking' (Honneth and Joas, 1991: 1). Liberal policy analysts critical of mainstream cost-benefit analysis did however begin to accept deliberation as a means of achieving consensus (Paris and Reynolds, 1983). But as Dryzek (1995: 108) points out, their approaches stopped short of being able to distinguish authentic from distorted communication leaving them prone to supporting hegemonic powers. A more specific criticism questions whether the domain of human action identified by Habermas is equipped to connect elements of social consensus, democracy and language (Outhwaite, 2009: 109). Joas (1991: 101) takes this position, claiming that the proposed sphere of action is narrow and therefore inadequate to navigate the diverse kinds of action necessary in a complex modern global society.

This objection is disputed by Habermas (1991: 249) who clarifies the parameters of his theory of action as broadly social rather than anthropological in scope. Another dispute raises doubts over whether the separation of system and lifeworld as distinct categories can address institutional and political questions. McCarthy (1991: 152-180) argues that in doing so Habermas understates the complexity of social institutions. Although Habermas gives priority to forms of resistance, the power of this opposition against liberal states in advanced capitalist societies is left in doubt. This criticism is only partly rebutted by an attempt to clarify system and lifeworld as analytical concepts (Habermas, 1991: 250-264). However, this clarification did not prevent critics from questioning the impact that the institutional weaknesses of his theory would have on democratic decision-making. As White (1995: 10) notes, 'The primary image one is left with is struggle at the margins. Healthy democratic impulses seem largely confined to the periphery of organized politics; from there they merely try to resist further systematic encroachment.' Notwithstanding this, debate over the emancipatory potential of Habermas' theory has positively contributed to widening the public sphere by opening up debate over the participatory role of social movements (Eley, 1992) and gender roles (Benhabib, 1992) in relation to policy issues.

The explanatory power of normative-deliberative theory is evident from examining its application to political cases. Reisigl and Wodak (2001) draw heavily on Habermas in their discourse-historical investigation of racial prejudice and immigration in Austria. Their study investigates how racial identity norms in Austrian politics were mediated by racist beliefs that brought about discriminatory practices on one side and anti-racist ideas that delegitimised social exclusion on the other (Reisigl and Wodak, 2001: 1-2). Wodak and Weiss (2005) use a similar approach that draws on argumentation aspects of normative-deliberative theory to focus on the discursive construction of identity in EU discourse. Cukier (2004) deploys Habermas' deliberative tools to examine information systems development based on case material from a technology enabled learning project. Cukier (2004: 252) concludes that 'validity claims can provide a standard that can be applied systematically to the analysis of discourse in order to identify

communication distortions.' This survey of the vital contribution of critical theorists brings us to critical realism as the fourth and final theory of discourse.

2.1.4 Critical Realism

Closely associated with the work of Roy Bhaskar, critical realism opposes empiricism and positivism in an attempt to form a philosophy of science. The central claim made by critical realists is that structures form objects of knowledge which exist independently of human understanding (Bhaskar, 1998b: 19). Put another way, 'reality exists independently of our knowledge of it' (Danermark, Ekstrom and Jakobsen, 2005: 17). The theory's critical stance on positivism is strongly influenced by Harré's work *The Principles of Scientific Thinking* (1970). It also builds on the foundation of Bunge's book *Causality and Modern Science* (1979) which takes a critical view of empiricist research for its reductionist perspectives on observability.

Although it could be regarded as something of an outlier among the discourse theory collective, critical realism makes three core contributions. First, it strengthens the case for ontology. Critical realists prioritise a theory of *being* over a theory of *knowledge* and argue that research rooted in epistemology plays out what is known as an 'epistemic fallacy' (Bhaskar and Lawson, 1998: 5). Positivist science, critical realists claim, falls prey to this misconception under the assumption that dispersed events form the core of knowledge and therefore an unsustainable epistemological position is supported (Archer *et al.*, 1998: xi). As Bhaskar (1998a: 648) suggests, taking an ontological standpoint indicates that discourses hold more than just intrinsic value and go beyond serving as mere communication tools. Second, critical realists have made a significant contribution towards the ongoing debate over structure and agency. According to realist philosophy, a deeper understanding of social relations and activity can be gained through a better grasp of how human agency transforms and reproduces social structures (Bhaskar, 2011: 3). Viewing context and conduct as relational properties enables us to overcome the problem of how structure and agency were previously treated as oppositional by competing social and political theories (Hay, 2002: 101). In particular, Archer's (1998: 369)

morphogenetic approach develops the structure-agency relationship while stressing ontological separability and the importance of time in how both factors shape one another. Finally, critical realists set out a uniquely powerful emancipatory agenda driven by the transformation of social structures. Through his 'explanatory critique', Collier (1994: 169-190) proposes that explanatory science can be both objective and accepting of value judgements, thus enabling social researchers to venture beneath the surface of ideas and prize open hidden meanings. Pressing for the discovery of values in objective science presents opportunities for liberation through the ability to 'expose not just false beliefs, but the false beliefs by which oppression and injustice are disguised ... and perpetuated' (Bhaskar and Collier, 1998: 389). For critical realists, identifying social and political ruptures provides an opportunity for structural change as a means to tackling intransigent social imbalances.

Taking up such bold and unique positions, critical realism exposes itself to a range of critiques. First, the philosophy is snubbed by some political discourse theorists. Torfing (2004: 19) questions the critical realist position that unmasking the intrinsic causality of social objects is the fundamental task of the social scientist. Similarly, Howarth (1995: 127) also precludes critical realism from his theory of discourse since he claims it denies the existence of meaningful objects in the wider discursive realm. The realist position on objects contrasts somewhat with Foucault's (1972) archaeological method which considers objects as enmeshed with discourse. Realists counter these claims by arguing these are purely idealist criticisms from theorists for whom reality is reducible to language and thought (Collier, 1994: 12). However, this is not to say that language hasn't factored into the development of critical realism. Fairclough (2002: 9) suggests that for critical realism to provide a more adequate analysis of the social world, the philosophy needs to be linguistically adapted to pay more attention to text and talk. Similarly, Danermark (2005: 27) recognises the key role of language in the search for knowledge of social and political reality.

A second area of contention concerns the perception of structure and agency in critical realism. Hay (2002: 125) argues that by setting structure

and agency as ontologically separate, the morphogenetic approach perpetuates a dualism that fails to adequately harmonise context and conduct. To overcome this issue, the author suggests a strategic-relational approach promoting a relational and dialectical existence between structure and agency. According to this approach, 'neither agents nor structures are real, since neither has an existence in isolation from the other,' and to that end 'structure and agency are mutually constitutive' (Hay, 2002: 127). In defence of the morphogenetic approach, Callinicos (2004: xxx) contends that by denying the existence of structure and agency, being 'real' is equated with the ability to exist autonomously from other forms of being. Ontological separation is justified on the grounds that 'insisting on the real differences between structure and agency does not deny their relatedness,' and that it is this difference that enables us to 'talk about interactions among structures and agents' (Callinicos, 2004: xxxii).

Through a strengthening of links between critical realism and language, the philosophy has become foundational to approaches such as Cultural Political Economy (Jessop, 2004) and variants allied with the critical discourse analysis tradition (Chouliaraki and Fairclough, 1999: 19). Critical realism has been foundational to research on topical themes in higher education such as the knowledge-based economy in Europe (Jessop, 2008) and the marketisation of universities (Fairclough, 1993). Furthermore, the work of critical realists has had a significant impact on the field of global politics. The contribution of critical realists to the structure and agency debate initially influenced Wendt (1987) to develop constructivism into a durable IR theory. This has since inspired numerous anti-positivist scholars to incorporate aspects of Bhaskar's theory into IR research (Kurki, 2008; Patomäki, 2002; Wight, 2006). The implications of this for policy studies are far reaching since critical realism exposes the weaknesses of the natural science-based agenda thereby advancing the opportunities for a post-positivist science of IR.

In sum, critical realism sits alongside poststructuralism, normative-deliberative theory and post-Marxism to complete an ensemble of discourse theories that are wholly compatible and in accordance with one another.

Before explaining how these theories combine and advancing the argument that they can be fused to form a unified theory of discourse, narrative theory will be discussed as a complementary element of the theoretical framework supporting a discursive approach to analysing the liberal model of international education.

2.2 Narrative Theory

In addition to these four compatible theories of discourse, narrative theory further complements the theoretical literature supporting discourse as a means of political inquiry. Narratives not only support the interpretivist assumptions of this quartet of theories that combine to enable understanding and interpretation of meaning, they also order discursive constructions of political reality in a familiar storytelling form and elicit the dramaturgical properties buried in policy puzzles.

First, let's explore the interpretivist background of narrative theory. In the contemporary interpretivist IR agenda, narratives provide an epistemologically valid mode of explanation since they work as re-tellers of historical events and re-cast the relationship between beliefs and political actions (Bevir and Rhodes, 2003: 20). The origins of narrative theory can be traced to the historian Louis Minks and his essay *Narrative Form as a Cognitive Instrument* (1978). Vann (1987) explains how Minks' position on historiography was influenced by his thinking on intertextuality, representation and narrative structures. Following this linguistic-turn in the field of history, narrative theory gained further support. In his first contribution to narrativity, White (1973) argues that even the most notionally objective academic work emerges in narratives. He supports this point by distinguishing between chronicles, or timelines of recorded historical events, and narratives, which enable historians to add meaning, significance and conclusions to events (White, 1973: 5-7). In his later work, White (1987) applied narrativity to historical studies and incorporated elements of poststructuralist thinking to bring attention to narrative modes of representation.

The pre-suppositions behind narrative theory and its ethical implications have, however, been scrutinised in the literature. Viewed as radical by mainstream historians, White's work has been accused of taking up a relativist position that denies historical evidence (Gossman, 1990: 303; Ginzberg, 1992). Although recognising that the charge of relativism wrongly reflects a conflation of moral and epistemological relativism, Kansteiner (1993) questions the ethics of White's narrativity because of the political risks caused by its tendency to mitigate the dangers of historical revisionism. However, this claim was arguably built on the thin ground of perceived ambiguity in the narrative theory literature. White (1987: 76) demonstrates his condemnation of historically revised accounts of sensitive political events, notably the Holocaust, thus distancing himself from morally reprehensible representations of history. To many however, narrative theory is an asset to the field of qualitative policy research. For Gottweiss (2006) the relationship between narrative theory and political investigation forms the basis of his argumentative approach to policy analysis. He rightly points out that, 'Narratives bring elements of clarity, stability, and order into what usually tends to be the complicated and contradictory world of politics' (Gottweiss, 2006: 468). For in the political realm, as with the judicial process, when numerous sites of meaning are in contention with one another, there is a performative risk for voices to go ignored or unheard within complex narratives (Threadgold, 2002: 49). The field of international education is believed to accurately fit the description of a contentious and complicated political arena, and therefore narrativity would enable us to untangle its inherent complexities.

Next, we turn to considerations of how narrative theory has as much to do with drama as it does with story-telling. For just as narratives interpretive politically produced meanings and re-present them in storytelling forms, they also address the dramaturgical characteristics of the epistemic community in which political stories are played out. The social scientists Dennis Brissett and Charles Edgley (2005b: 2) broadly define dramaturgy as 'the study of how human beings accomplish meaning in their lives'. The notion of a dramaturgical society originates from the seminal work of the sociologist Erving Goffman (1956) who first adapted theatrical concepts to

the study of social phenomena. For Goffman (1956: 1), it is through interactions between social actors presented in the theatre of life that beliefs and attitudes can be deciphered. Efforts to apply dramaturgical perspectives to the social sciences owe a debt to the literary theorist Kenneth Burke (1969) responsible for developing dramatist concepts, including 'acts' and 'scenes', to better understand the motivations of social actors. As Smith (2013: 61) points out, a key legacy of Goffman and Burke is that their contributions converge in relation to the rhetorical and persuasive dimensions of human interaction in which actors seek to persuade others of the validity of their arguments. These argumentative elements of dramaturgy accord with the inherent power dimensions of the theories of discourse outlined above, and similarly the dramaturgical aspects of narratives are as relevant to the political arena as they are to other realms of the social sphere.

Dramaturgical elements of narrative theory have not been immune to criticism, forcing its contemporaries to make concessions and defend dramaturgy. One criticism is that dramaturgy cannot be considered a theory at all since it does not produce sets of testable hypotheses or other properties usually possessed by formal social theories (Stryker, 1987). This claim is partially accepted by Brissett and Edgley (2005a: 24) who, while recognising that in isolation the dramaturgical model is non-systematic, stop short of a full concession by highlighting how dramaturgy connects and resonates with more established theoretical models related to ethnomethodology and other humanistic approaches in the social sciences. Stronger objections have been made against prominent claims that the theatre metaphor is merely a fictional notion and therefore of little relevance to 'real world' social and political issues (Wilshire, 1982; Psathas, 1977). As Brissett and Edgley (2005a: 31) rightly point out, life is neither fully distinct from nor completely the same as theatre, rather social existence is essentially 'theatre-like'. The authors rightly go on to illustrate that instances of time compression, scripting, ad-libbing and direction can all be viewed as examples of cross-over between theatre and social reality (Brissett and Edgley, 2005a: 31). Having outlined the contours of narrative theory as complementary to the four compatible theories of discourse, we

turn next to how these models can be brought together to form a united anti-positivist agenda in policy research.

2.3 Towards a Unified Theory of Discourse

Although each theory of discourse introduced above has its own distinct characteristics, the underlying themes of power, subjectivity and structure-agency overlap significantly to strengthen the case for a unified theory of discourse. This is not to deny that the claims of theoretical incompatibility are no longer circulated in the study of discourse. It is necessary to be aware that, for example, Marxists continue to regard language in ideological terms and would argue that discourse theory reduces material socio-economic systems and processes to ideational and linguistic factors. Others who share the common goal of harmonising these theories deny this charge, arguing that discourse acts as a metaphor of agreement between language and social systems thereby offering a powerful theoretical basis upon which to conduct policy research (Howarth, 2000: 13). Adding on to this, discourse theorists have made further progress towards harmonising other seemingly disparate theoretical strands. For Ingram (2005: 240), the poststructuralist and normative-deliberative theories associated with Foucault and Habermas are also compatible since both thinkers can be considered as humanists with a shared understanding of the role of rights and democracy in shaping the critical tendencies and actions of human actors. Hay (2011) also makes a key contribution here, bringing harmony to the relationships between so-called rival theories of discourse, notably critical realism and distinctly more constructivist-based theories such as poststructuralism, that find common ground in interpretivist IR. Furthermore, it has been shown that poststructuralism also combines well with the dramaturgical principles of narrative theory (Vannini, 2013).

One potential issue of uniting these theories of discourse is that this leaves the door open to claims of theoretical eclecticism. It has been well-documented that the tendency of discourse scholars to draw together a range of supporting philosophies complicates the theoretical task (Luke, 2002: 98). Pennycook (2001: 87) takes this argument further, crudely describing these efforts as 'a strange mixture of theoretical eclecticism and

unreflexive modernism'. That said, those who recognise the compatibility of these theories of discourse are supported by others who rightly subscribe to the view that instead of viewing differences as obstacles in a race to find a single superior theory, the plurality and diversity of discourse theories is something to be celebrated (Glynos *et al.*, 2009: 35; Howarth, 2000: 133; Wodak and Weiss, 2005: 124). As Glynos (2009: 36) accurately points out, these diverse theories of discourse are malleable and can be combined on merit of their critical and empirical foundations in spite of differing philosophical presuppositions. This careful combining amounts a shifting theoretical synthesis that could be better understood as a kind of 'principled eclecticism' which, if anything, truly strengthens the discourse approach (Henderson, 2005: 14). By reconciling these theoretical differences and synthesising them into united theory of discourse, a durable foundation for anti-positivist political inquiry is established (Howarth, 2000: 5). A unified theory of discourse provides the footing for a discursive and post-empiricist mode of contemporary inquiry in IR that, when applied to the study of social meaning, competently makes sense of complex political realities (Fischer, 2003: 48). Simply put, a united theory of discourse adds value to investigations into public and foreign policy dilemmas in several ways: it poses the types of research questions that empiricists miss, it emphasises the manner in which language constitutes social structures, it pays attention to continuity and change in political struggles, and it foregrounds issues of power and domination (Torfing, 2004: 22-3).

2.4 Summary

This study seeks to develop our understanding of the social and political beliefs driving international education policy. The case has been made in favour of a unified theory of discourse as the best way to shed light on the policy puzzle surrounding the liberal model of international education. This chapter has surveyed a range of distinct yet complementary theories of discourse that provide a philosophical grounding for taking a discourse analytical approach to the key policy documents on international education produced between 2000 and 2020. It has also introduced narrative theory into this mix, arguing that narratives deepen our understanding of how power is exercised through language. In this study, the significance of

narratives provides sound theoretical underpinnings for presenting the analysis in a storytelling form and for taking a dramaturgical perspective of the policy puzzle under investigation. The main argument advanced is that these seemingly independent theories are compatible and can be synthesised to form a powerful unified theory of discourse that challenges positivist modes of inquiry in public and foreign policy. In the chapter that follows, the unification of these discursive theories provides the philosophical premise for developing a novel interpretive and discursive approach to public policy analysis that reveals how the liberal model of international education was discursively constructed as a grand narrative.

Methodology

The study has so far introduced the policy puzzle surrounding the liberal model of international education, highlighted the importance of ideational factors in understanding and resolving the dilemma under investigation, and discussed the theoretical issues behind this study of how the field of international education was discursively constructed as a grand narrative. In the previous chapter, arguments were advanced in favour of a unified theory of discourse capable of bringing together the philosophical foundations of discourse studies that underpin the chosen analytical approach. This chapter explains how the research project was designed to better understand the policy dilemma facing international education. Section one introduces a new interpretive variant of political discourse analysis and outlines its benefits vis-à-vis rival approaches. Second, the chosen approach is positioned against previous discourse analysis that resulted in a clearer understanding and explanation of policy dilemmas. Section three provides a step-by-step guide to how the analysis was done and outlines the empirical data used. Following this, the chapter then explains how the approach triangulates findings and outlines methodological refinements before evaluating the limitations and perceived weaknesses of the discourse method. By systematically outlining the analytical steps of the approach and being transparent about the decisions made, this chapter aims to clearly convey the thought process the researcher went through when developing the analysis in the chapters that follow.

3.1 Interpretive Discourse Analysis

This study showcases Interpretive Discourse Analysis (IDA), a fresh approach to public policy analysis, as the preferred method. IDA is a hybrid approach which synthesises Dvora Yanow's (2000) Interpretive Policy Analysis (IPA) with the Discourse-historical Approach (DHA) created by Ruth Wodak (2001) and significantly refined by Michał Krzyżanowski (2010). In

IPA, reified aspects of discourse such as language, physical objects and human actions are assumed to exist in a two-way relationship with meaning in the form of values, ideas and beliefs (Yanow, 2000). In terms of production, when policy makers communicate their recommendations in reports or speeches, their text and talk is loaded with symbolic values and beliefs. There is a performative aspect to these communicative acts since they are simultaneously both part of the policy process and producers of policy. The DHA is one of many approaches derived from Fairclough's (1992) research tradition of Critical Discourse Analysis (CDA). Similarly, Wodak (2001: 66) shares the view that language and social practice have a dialectical relationship in that they constitute one another. However, the DHA develops CDA's three-dimensional model (text-discourse-social practice) by analysing the context surrounding political puzzles and integrating these with interpretations of the discourse (Wodak, 2001: 67). In IPA, social context is considered prior knowledge and attention is focused on textual and discursive practices. By combining aspects of the DHA, relevant theories related to the policy issue can be elicited during analysis and the levels of text and discursive practice can be situated within the wider social, cultural and historical contexts (Wodak, 2001: 69). Another way these approaches complement one another is that they prioritise empathy over emancipation. Thus IDA follows suit, setting out not to judge right from wrong but to make justifications based on theory and interpret why some public policy choices may be more acceptable than others.

Several approaches allied to the CDA tradition were considered for IDA before arriving at the DHA as a key inspiration. Fairclough's (2010) Dialectical-relational approach was initially considered for inclusion. However, it was decided against due to its overly-complex terminology which makes the approach largely inaccessible to non-linguists (Lin, 2014). The Socio-cognitive approach devised by van Dijk (1993) was similarly considered but refused. This time because the approach provides little recourse to a positive transformation of social structures (Luke, 2002; Martin, 2004). The DHA is considered a more suitable approach to combine with IPA for reasons that go beyond its above-mentioned preference towards an empathetic stance. First, the DHA is user-friendly and lays out

a clear set of steps understandable by investigators with an elementary knowledge of the study of language (Lin, 2014). Second, the approach was specifically developed with political analysis in mind and has the relationship of language and policy at its heart (Krzyżanowski, 2010). Based on these strengths, and its similarities with IPA, DHA was selected to as key ingredient of the IDA approach used in this study.

The definition of discourse used in the design of IDA refers to an interrelated set of texts and the practices of their production, dissemination and reception that brings an object into being (Parker, 1992). This differs from narrower forms of discourse analysis used in applied linguistics that take units of discourse as anything above sentence level and interprets interaction within immediate social contexts (Coulthard, 1985; Widdowson, 1978). IDA is therefore something different from the study of discourse as the practices of talking and writing (Woodilla, 1998), or what Gee (2010: 34) calls lower-case 'd' discourse. Associated textual forms of analysis tend to be highly presentist and overly pragmatic. By focusing on short dialogues or keyword frequency, these approaches merely analyse specific situations thus ignoring the wider historical context and power dimensions of the social issues they seek to explain (Pennycook, 1994: 120; Renkema, 1993: 21). In contrast, IDA prioritises historical contexts as explainers of contemporary policy puzzles and seeks to expose hidden dynamics of domination and control.

IDA is distinct from and has advantages over other forms of textual analysis. Much discourse analysis conducted on education in the promotion of international development has tended to lean towards content analysis (Baxter, 2011; Marks, 2014; Joshi and Smith, 2012). Although initially considered for this study, content analysis was rejected as it suffers several fundamental problems that weaken its potential for interpreting public policy dilemmas (Daddow, 2011: 85). Firstly, content analysis would only be able to identify 'if' and 'how often' the objects of research appeared in the discourse thus ignoring the process of meaning making. Secondly, it proves more useful for analysts new to a particular policy field. But because significant familiarity has been gained with the concepts in international

education through extensive study, the next step is to undergo a detailed interpretive analysis of values, beliefs and meanings in the discourse.

A further justification for taking an IDA approach concerns its epistemological assumptions about policy research that are bound up in the ontological viewpoint of the unified theory of discourse discussed in the previous chapter. Whereas mainstream policy analysts use quantitative methods to seek causal explanations of *why* education policies succeed or fail to improve schooling access and quality outcomes, IDA analyses policy in terms of *how* elite beliefs sediment and come to shape education policy practices (Epstein, 2008; Wodak, 2001). In this respect IDA is complicit with the interpretive turn in policy analysis (Epstein, 2013; Bevir and Daddow, 2015). In other words, IDA sits squarely against the naturalist view that policy analysis is a technical exercise flowing from the economist rulebook. This perspective is evident in the rationalist model (Weimer and Vining, 2011) and the associated technique of cost-benefit analysis (Eckstein, 1958), the latter being commonly applied tool in education policy research (Carneiro and Heckman, 2003; Psacharopoulos and Patrinos, 2002; Belfield, 2009). As Bevir and Rhodes (2003: 3) point out, the weakness of such positivist inquiries into public policy dilemmas is that they 'postulate given facts divorced from theoretical contexts as the basis of legitimate claims to knowledge'. Instead of arising from common laws, perceptions of truth and facts derive from theoretically informed beliefs. That said, IDA agrees with the logic that a calculus of precise causality in policy analysis has a lower probability of generating understanding than an inquiry that explores representations and meaning (Milliken, 1999: 226). Before unpacking the nuts and bolts of IDA, we next survey some of the extant literature detailing how discourse analysis has been applied to policy dilemmas.

[3.2 Relevant Literature](#)

Discourse analytical approaches in agreement with IDA have been deployed effectively to investigate a range of puzzles in public and foreign policy. Environmental studies have utilised discourse approaches to explore a variety of topics including the international whaling debate (Epstein, 2008)

and contested meanings of ecological terms (Dryzek, 2005). Discourse on institutionalised racism has been analysed in various political contexts: racial categorisation in US public administration (Yanow, 2003), racist and anti-Semitic discourses in Austrian politics (Wodak and Matouschek, 1993; Reisigl and Wodak, 2000) and framings of Muslims in the British media (Richardson, 2009). Another policy issue to profit from the discourse approach has been liberalism and the politics of New Labour, specifically constructions of 'Third Way' politics (Fairclough, 2000) and political speeches on international security as maintaining Britain's status as a hegemonic power (Fairclough, 2005). The value of the discourse method has also been powerfully highlighted through analysis of Britain's relationship with the European Union (Daddow, 2011; Todd, 2016). Again, what each of these policy analysts share is an anti-positivist agenda critical of mainstream economic approaches to analysing policy. Observability in the physical world is rejected in favour of meaning, and meaning-making in the social and political sphere is paramount.

Discourse approaches aligned with IDA are gradually becoming accepted as analytical tools for investigating education policy issues. As Ball (2013) demonstrates, one relevance of poststructuralism to education concerns how Foucault's genealogical approach lends itself amicably to analyses capable of exposing the historically embedded technologies of power in the British education system. Also relevant is research on political reform in higher education that has benefitted from the discourse approach. Fairclough's (1993) analysis of UK higher education discourses identifies the construction of entrepreneurial identities that position universities within the broader social processes of marketisation and commodification. Similar discourse research on East Asian contexts indicate that this is part of a wider global trend of higher education aligning itself with free market values (Zhang and O'Halloran, 2013; Xiong, 2012). Of further relevance is the application of discursive approaches to studies of the knowledge economy. The economic dimensions of education are well-suited to interpretive discourse approaches since the knowledge economy is perceived as a 'powerful economic imaginary' (Jessop, 2008: 2). Fairclough and Wodak (2008) combine analytical approaches to expose the EU Bologna Process as

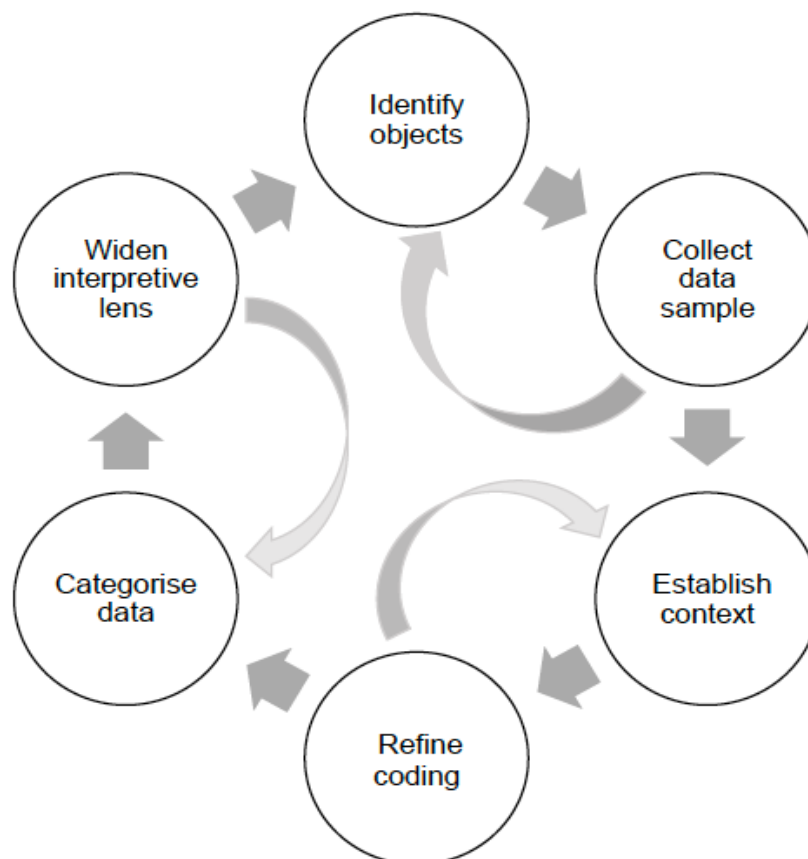
a discursive means to drive higher education reform whilst promoting Europe as a knowledge economy.

Applying IDA to the liberal deal builds upon the studies of other discourse analysts who have also investigated policy dilemmas in international education. Vavrus and Segers (2010) interrogate the way the term 'partnership' was used and abused in World Bank and International Monetary Fund participatory poverty reduction policies in Tanzania. The authors revealing how participants' opinions about ways to improve education and other public services were silenced by dominant neoliberal meanings of the term. McCormick (2012) shows how the norms of authoritative EFA documents intertextually colonised thinking about education quality in Cambodia and Laos. The study uncovers how dominant institutional reports can override national ownership of international education in aid-receiving countries. Through a discourse analysis of the World Bank's Education 2020 Strategy, Nordtveit (2012) discloses the underlying neoliberal beliefs of the Bank by exploring overly optimistic and hubristic representations of the future vision for the developing world. Seemingly innocuous and upbeat terms used in the strategy report were found to mask injustices and inequalities that shape the reality of student and parent lives in poorer countries. In sum, this survey of previous research indicates that IDA, and associated approaches, provides a potent method for understanding seemingly unsolvable puzzles in public or foreign policy and is suited to analysis of dilemmas in international education.

3.3 Method

Having made the case for taking a discursive approach to policy analysis, this section outlines the systematic steps followed in IDA and explains the selection of texts before describing the pilot study that brought the research questions into focus. IDA considers discourse research as abductive, meaning it infers the most plausible explanations for phenomena. Because of this, and the iterative nature of discourse analysis, these stages did not occur in a linear order (see figure 3). There was as a constant 'to and fro' between observed language, textual meaning, contextual background and, ultimately, the interpretation of intended meaning.

Figure 3. The non-linear process of IDA



The key stages of the IDA can be described as follows:

1. Locate the objects of research (e.g. language, ideas or actions) that contain, and are vehicles for, political meaning.
2. Collect a sample corpus of documents relevant to the objects of research. Determine the genre of texts and connections between other texts and discourses. Carry out a pilot study to establish a coding scheme.
3. Establish the wider context and identify communities of interest surrounding the policy issue. Formulate research questions and develop theoretical frameworks to explore these.
4. Refine coding and analyse the discourse by deploying appropriate interpretive tools such as argumentation, framing and legitimation. Using the chosen theories, interpret meaning from discourse related to objects being investigated.
5. Categorise coded data into themes and topics that emerge in the discourse. Identify conflicts and divergences in meaning interpreted by

communities of interest. Uncover plots and sub-plots in the story that evolved then interpret a grand narrative.

6. Widen the interpretive lens to make normative interventions. Clarify the implications of various meanings, empathetically demonstrate that diverse perspectives reflect different ways of viewing social reality and then provide reconciliation to bridge differences.

The case material is drawn from official documents relating to international education policy from 2000 to 2020. A purposive sampling method was initially used to collect a set of core policy documents sourced directly from the online databases of governments and major institutions including the World Bank and various UN agencies. Details of the most important reports in the core policy level of the corpus are presented in table 3. From this point, snowball sampling was mainly used drawing on references in these core sources which acted as leads not only to other core policy documents but also to non-profit sector reports, academic literature and media sources. Newspaper articles that formed much of the context for the analysis were sourced online through the Nexis database.

Table 3. Key source timeline

Key Documents	Year	Description
UNESCO, Dakar Framework for Action.	2000	Report from the World Education Forum where the 1990 Goals were reaffirmed and revised to focus more on gender and education quality.
UN Commission on Human Rights, Report by the UN Special Rapporteur on the Right to Education.	2000	Katarina Tomaševski's first progress report as Special Rapporteur on the right to education provides an in-depth but pessimistic inquiry into education as a human right.
UK Dept for Education and Skills, Schools: Achieving Success (White Paper).	2001	Formed the basis of the Education 2002 Act under New Labour allowing greater school autonomy and establishing academies in the UK. Reflected the tone of international reforms.

UNESCO, EFA Global Monitoring Report: Is the World on track?	2002	The first GMR identified itself as an accountability tool and explains the EFA Fast-Track-Initiative.
World Bank, World Development Report: Making Services Work for the Poor.	2003	Supports reforms aimed at increasing participation, contracting out and ensuring greater choice in public provision.
USAID, Education Strategy: Improving Lives Through Learning.	2005	US foreign policy on education setting out its preferences for institutional reform and cost-efficiency measures.
World Bank, From Schooling Access to Learning Outcomes.	2006	The report that most clearly articulated the shift from access and enrolment to education quality and actual learning.
UNICEF, A Human Rights-Based Approach to Education for All.	2007	A major institutional moment for the right to education as it attempted to reassert the human rights dimension of EFA. Heavily influenced by Katarina Tomaševski and published a year after her death.
USAID, Education Sector Strategy 2011-2015.	2011	Marked the beginning of austerity in US foreign policy and put value for money at the top of the agenda alongside evidence-based policy.
World Bank, Learning for All.	2011	A key report since it laid out the Bank's Education 2020 strategy and the drive for learning outcomes. It also drove home the post-financial crisis cost efficiency mantra.
DfID, Education Position Paper.	2013	The UK's most important education foreign policy document of the period. Commitment to learning outcomes through smart investment was its core message.
UNESCO, Education 2030 Incheon Declaration and Framework for Action.	2015	Set out the vision for education in line with Sustainable Development Goal 4 which emphasised inclusion and Lifelong Learning.
World Bank, World Development Report: Learning to Realize Education's Promise.	2018	Promoted evidence-based policy making directed at delivering quality education and learning outcomes.

A key consideration was that the corpus should be as representative of the research object as possible. Therefore, it was understood early on that core documents ought to be taken from a diverse range of sources to build up the epistemic community around the field of education and development over the twenty-year period of study. One limitation on the representativeness the corpus concerned the decision to restrict it to Anglophone texts. This was due to the impracticalities of translating original policy documents that make up the epistemic world of international education from various major and minority languages. The representativeness of the corpus would therefore depend on incorporating a body of texts that constituted a discourse community of policy actors and institutions. To this end, it was decided that the corpus documents would cover the following intersecting fields: institutions, civil society organisations, individual political actors, academics, educational actors, private sector businesses and the media.

Institutions comprise a major field in the international education corpus. Intergovernmental organisations including the World Bank, OECD, UNESCO and UNICEF produced and disseminated the most significant and impactful reports on education and development during the period of study. Historically, the World Bank has played a crucial hegemonic role in maturing the neoliberal agenda that has pervaded international education since the 1980s. One example was the heavily criticised structural adjustment programmes which involved conditionalities attached to loans to developing countries that demanded fiscal austerity in exchange for macroeconomic instability. The World Bank responded to criticism by evolving from within to defend liberal development theory by putting 'good governance' at the top of its agenda in the 1990s and early-2000s. For critics, however, this evolution in the direction of the Bank amounted to little more than a continuation of the status quo, or a 'post-Washington consensus', in that it remained faithful to the neoliberal principles of privatisation and deregulation (Fine, 2001: 10; Saad-Filho, 2005: 118). Reports by the OECD included in the corpus tend to echo the policy and practice of the World Bank. Turning to the UN agencies, their role in resisting undesired elements

the Washington consensus provides a fundamental grounding to understanding the core policy data featured in the analytical chapters. As opposition to structural adjustment suggests, the power and reach of neoliberal hegemony fundamentally shaped the stance and activities of UN agencies (Weiss and Daws, 2007). Doubling down on the universality of human rights led to the adoption of the 1993 Vienna Declaration and Programme of Action resulting in the establishment of the Office of the High Commissioner for Human Rights (OHCHR), which has organised all UN human rights activities ever since (see Mertus, 2009 for a full discussion of the role of the OHCHR in the UN's human rights practices and a detailed overview of the UN charter-based bodies). In the years preceding the grand narrative, UN agencies worked to reconceptualise development and soften the World Bank's policy, signalling a mainstreaming of human concerns into structural adjustment programmes (Weiss, 2016: 445). In addition, the national development agencies of major donor countries active in international education also come under the label of institutions and ought to be briefly previewed here. The prominent role that the UK Department for International Development (DfID) and the United States Agency for International Development (USAID) played in supporting the hegemonic discourse of the neoliberal-leaning intergovernmental organisations secures their role as leading institutional actors.

Civil society organisations constitute another field of the corpus. In addition to the reform pressures of the UN agencies, the influential role of civil society further challenged the hegemonic discourse of the World Bank and OECD through the human rights advocacy work of international NGOs (Dorsey and Nelson, 2004). Key civil society organisations active in education for development include Save the Children and Oxfam. In addition, this field would also include the growing group of philanthropic foundations involved in the funding of education over the period of study. Philanthropists tended to be supportive of the hegemonic discourse and the corpus includes work on global education by the Bill and Melinda Gates Foundation, the Mastercard Foundation, the LEGO Foundation, the Pearson Foundation and the Rockefeller Foundation and the Chan Zuckerberg Initiative

The text and talk of *individual political actors* was selected for the corpus because notable players acted as so-called 'norm entrepreneurs' in the international education discourse. Key innovators in the field worked to advocate the dominant economising discourse or contain it to varying degrees. On the advocacy side we will encounter actors such as Gordon Brown who used his personal authority to frame social empowerment aspects of the vision of international education as a by-product of the economic interest in learning. There will also be appearances by less obvious advocates like Kevin Watkins, the prominent international education and social justice campaigner who used his expert authority to tentatively approve philanthropic involvement to achieve these aims. In contrast, the corpus also features the work of those who held the role of Special Rapporteur on the Right to Education, a position supported by the Special Procedures branch of the OHCHR. Incumbents during the period of study include Katarina Tomaševski (1998-2004), Vernor Muñoz Villalobos (2004-2010), Kishore Singh (2010-2016) and Koumbou Boly Barry (2016~). As the story unfolds, we will see how these actors challenged the hegemonic discourse around economic liberalism with counter-narratives framed around humanistic concerns.

Academics form another field of the corpus. Key scholarly literature responded to and contributed to debates over aspirations, modes of governance and policies in international education. The corpus features research by prominent economists such as Eric Hanushek and James Heckman who both supported the hegemonic discourse. Educationalists on the other hand challenged this and therefore works opposing private sector involvement in schooling by key academics such as Susan Robertson, Antoni Verger and Pauline Rose are also added to the corpus. It should be noted here that in the analytical acts references are made to historical material from scholars published prior to 2000. In political discourse analysis this is justified on the grounds that prior literature is necessary to trace the lineage of dominant representations and counter-framings (Todd 2016: 19). To avoid confusion for the reader, the bibliography is split into two separate lists, one exclusively for the corpus documents and another for other

literature used in the study which includes the historical material used in the analysis.

Finally, three other fields complete the corpus and add to its representativeness of the epistemic community. *Educational actors* in the corpus include the work of so-called 'edupreneurs' such as James Tooley, Norman LaRocque and Michael Latham who supported dominant institutional discourses around privatisation. These actors often simultaneously assumed multiple roles as policy advisors, academics and school chain owners. Secondly, *private sector businesses* such as Bridge International Academies which embodied the spirit of economic liberalism are included. Finally, *media* sources feature prominently in the corpus for the way in which the work of journalists, both UK-based and internationally, added much needed context to the representations that supported or resisted the hegemonic discourse.

Following an early review of literature that updated the analysts existing knowledge of policy debates around international education, a pilot study was conducted in which a small sample of documents were coded alongside an experienced political discourse analyst. The data for the pilot was a small and manageable sample of three documents: 1) World Bank (2011) Learning for All (Executive Summary pp.1-10); 2) DfID (2013b) Education Position Paper (Executive Summary & Why Invest in Education pp.3-6); and, 3) EFA Coordination Forum, Republic of Indonesia (2015) EFA 2015 National Review Report for Indonesia (Introduction pp.1-4). These three texts were decided on as they were deemed relevant to the initial guiding themes, they represented the ideas of both multilateral and bilateral donors plus those of a recipient nation, and because they were all published during a similar timeframe allowing for development of a contemporary coding scheme that could be applied to other texts published in the post-2000 period. The selection was limited to executive summaries and short introduction sections of reports only since coding can be very time-consuming in the early stages. The pilot study was geared towards improving the reliability of the study in two ways. First, it verified that the IDA process described above was appropriate to the objects of study and the research questions

being asked. The second purpose was to verify the reliability of the coding scheme and develop a framework to categorise the data. Once an initial coding scheme was in place and the context of the study began to take shape, the three research questions that would guide the analysis came into view:

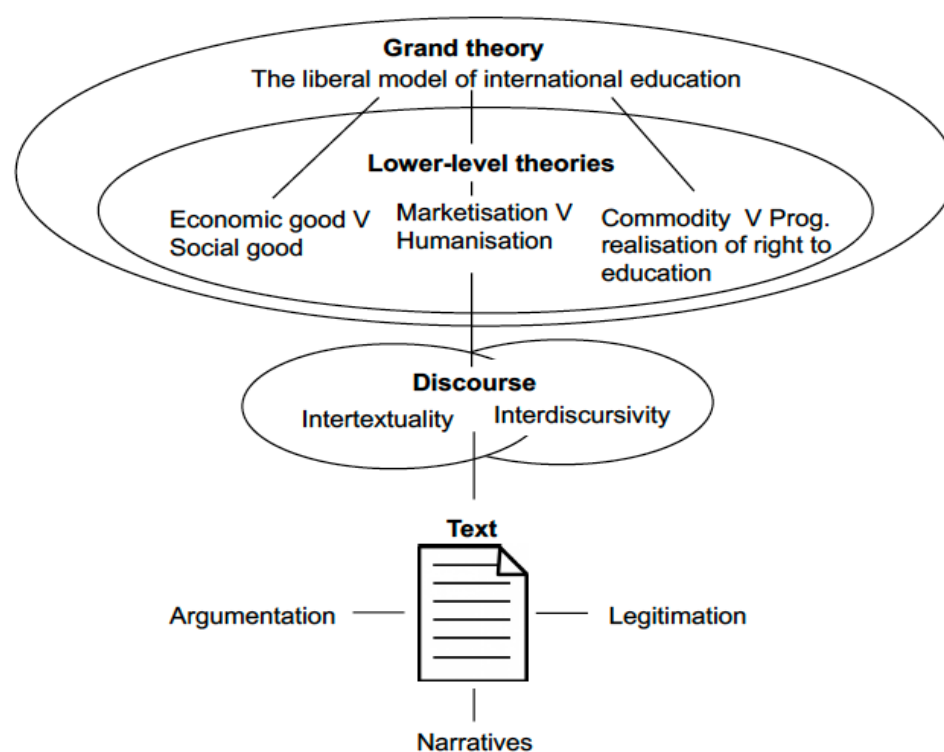
- What kind of vision drove the global education agenda between 2000 and 2020?
- How did actors discursively construct the administrative system governing international education?
- What were the ideas behind the international education policies put into practice and the evaluations of policy outcomes?

3.4 Triangulation Through Levels of IDA

With the research questions formed and the pilot completed, IDA could then be applied to the data to establish the wider context, refine the coding and categorise data. Key to IDA is the principle of triangulation. Working in an interdisciplinary fashion to include a range of knowledge and tools triangulates findings and guards against committing bias or blatant over-politicising (Reisigl and Wodak, 2001). Triangulation is achieved by blending textual analysis, discursive concepts and theory relevant to the policy puzzle (see figure 4). The text level analyses language in use, the field of discourse addresses intertextual and interdiscursive dimensions, and salient theories anchor the analysis to the policy puzzle and connect with wider social, cultural and historical contexts surrounding the study.

Alternative means of triangulation were attempted before settling on this model. For instance, email enquiries were made with UNESCO to discover more about how the GM(E)Rs were produced and to probe into the origins of the ideas and beliefs presented in them. The response, however, didn't reveal anything more than was already known about the commissioning of background papers and online open consultations. To continue with the theory-discourse-text paradigm, the three levels are borderless and blend seamlessly in the analysis, but for the purpose of transparency and clarity it is useful to unpack and outline each level of analysis.

Figure 4. Levels of analysis in IDA



Adapted from Wodak (2001: 69)

3.4.1 Theory Level

This analysis is informed by a two-tier model of grand and lower-level theories which form the theoretical context of the narrative. The liberal model of international education takes centre-stage as the grand theory around which this policy area was troubled by conflicted norms and disharmony. As outlined in the introductory chapter, it was the dominant elements of economic liberalism in the prevailing model of education for international development that chiefly elicited buried tensions and contradictions. With the grand theoretical framework in place and the underlying assumptions understood, theory then works to develop sub-categories of data (Wodak and Weiss, 2005: 125). Operating beneath the main framework we find the lower-level theories, also briefly described in the introduction, that serve the analysis by directing the coding of topics and interpretation of binaries. Composite of each binary is one pole supportive of pro-market economic liberalism and another offering a critical perspective of the liberal model.

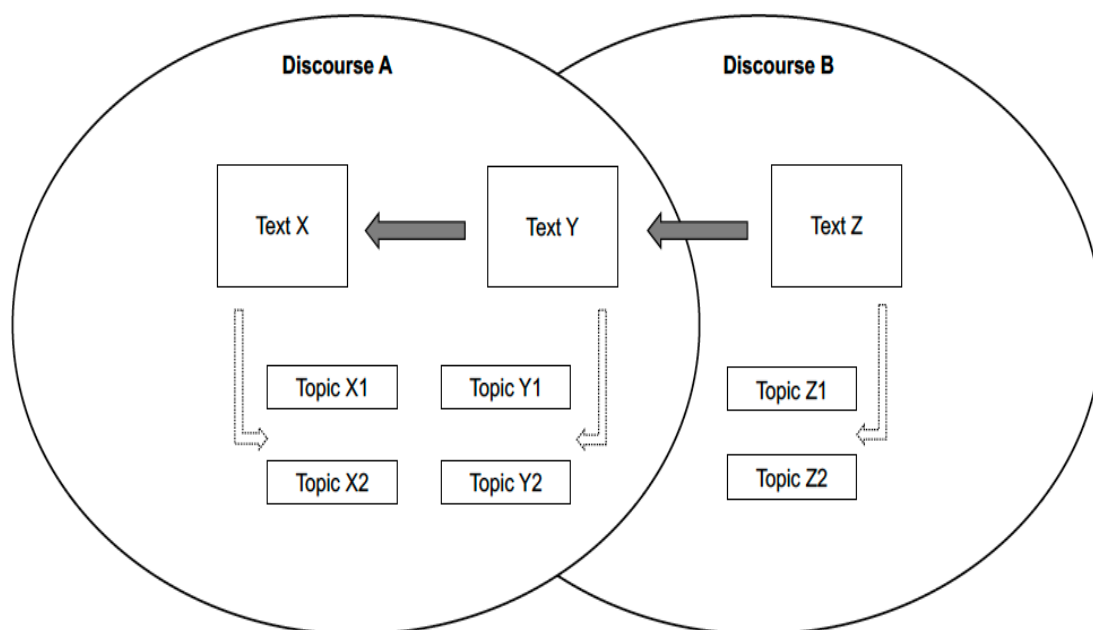
The analytical themes address each of the research questions and speak to theoretical concerns over this set of binaries. Firstly, the vision theme is guided by a theoretical dispute over education as an economic or a social good. Actors who believe in education investment decisions based on economic approaches face challenge from rival beliefs supportive of education as a social good that delivers public benefits beyond greater profits, higher incomes or exponential economic growth. In the process theme, theories about marketisation and humanisation inform the analysis. Beliefs leaning towards humanist and anti-neoliberal ideologies struggle to weaken the dominance of managerial norms driving the entrepreneurial processes of cost-cutting, monitoring and the unleashing of market forces. Finally, the outcomes are directed by lower-level theories debating the extent to which education constitutes a commodity or a human right worthy of progressive realisation. As the analysis will show, beliefs in support of the full achievement and enjoyment of the right to education encountered rivalry from actors who valued the competitive marketplace of educational goods and services. In sum, while the grand liberal theory of international education shapes the disharmony in the overall narrative, the lower-level theoretical binaries elicit the scenes that make up each act and also draw out the power relations concealed in the discourse. Before moving to the textual level and how various coding strategies reveal the tensions which formed conflicting narratives, let's examine the discursive field.

3.4.2 Discourse Level

Moving beneath the theoretical level leads us to the key dynamics of intertextuality and interdiscursivity illustrated in figure 5. Intertextuality is defined as the understanding that all texts are composed of parts of other texts already in existence (Kristeva, 1980). Simply put, it is highly unlikely that any political document is a standalone text. Intertextuality (highlighted by the arrows connecting texts x, y, and z) can be evident in a variety of different ways: through direct quotations, translation into a different language and revisions to original texts either under duress or at the author's preference (Miola, 2004). This concept is useful for tracking the spread of beliefs in textual production to see how past meanings are altered, present interpretations are revised and later texts are created (Fairclough,

1992; Hodge and Kress, 1993). For example, the first act of the narrative will analyse the intertextual dispersion of nebulous rates of return to education statistics and how these are used to reinforce the norm of economic prosperity as an aspirational priority in international education. Tracking intertextual dynamics is particularly useful for identifying discursive shifts that highlight wider aspects of policy continuity and change embedded in policy puzzles.

Figure 5. Intertextuality and interdiscursivity



Adapted from Wodak (2001:69)

The related concept of interdiscursivity transcends intertextuality to examine how topics within different types of discourses, with all of their institutional markings, interact and combine with other discursive topics in a particular field (Fairclough, 2003; Wodak, 2008). Intertextuality remains a major feature in this dynamic as when discourses coincide, texts contain aspects of one another. Within this process, topics and sub-topics merge together in unexpected ways. As will be seen in the second act, an example of interdiscursivity lies in how elements of a discourse about managerialism were diffused through public education discourse to establish itself as a sub-topic of the latter. The recontextualisation of these elements resulted in the powerful structuring of a consultancy-style administrative system of

governance in international education that supported mechanisms based around results, efficiency and performativity. The key point is that these relations between discourses, text and themes impact on social and political practices by creating subjectivities, reproducing existing structures and transforming or destroying political norms and ways of being (Reisigl and Wodak, 2001). Applying this level to the analysis encourages an appreciation of the hegemonic structuring of discourse and the role that texts play in the diffusion of power.

3.4.3 Text Level

As the coding strategy matures and is confirmed by analytical categories, various tensions, arguments, contradictions and concessions can be teased out through analysis. As Epstein (2008: 12) indicates, the key modality of political reality is conflict rather than cooperation and ruptures of change determine history to a greater extent than continuities brought about by agreement. Making sense of these decoded tensions requires analysis at the textual level to investigate language in use. Again, this is a customised exercise rather than a one-size-fits all solution since the choice of analytical tools depends very much of the specific social or political issue under investigation. The discursive strategies most relevant to analysing the liberal deal in international education are legitimisation and argumentation. Both strategies reinforce the beliefs of actors and combine to support the construction of narratives within and between categories.

Legitimation is one means of representing or framing political reality. It is the representation of political ideas that determines how actors make sense of policy discourse and interpret meaning. Legitimations supplement representations of political practices by adding extra elements to the framing (van Leeuwen and Wodak, 1999). When actors legitimise or delegitimise political practices they foreground certain clues, validate beliefs and reinforce ideas. Legitimation of policy choices is particularly salient to the field of international education policy because rival actors vie to validate their decisions based on moral or logical positions. One powerful type of legitimation in this analysis is authorisation. By using personal, expert or role model status, political figures in positions of power are able to legitimise

education policy practices. An example of personal authority in the empirical data concerns the various roles Gordon Brown played as a key player in shaping the liberal education model, first as Blair's Chancellor of the Exchequer and Prime Minister, then later on as United Nations Special Envoy for Global Education.

Whereas legitimation works more to defend entrenched beliefs in discourse, argumentation goes on the offensive to change them. On the one hand, argumentation persuades others that a course of action is best based on certain values or norms, while on the other it challenges the beliefs of others (Finlayson, 2007). Analysing argumentation strategies in the discourse allows interpretive researchers to reveal how political actors provided reasoning for their actions. As a practical analytical tool, various argumentation categories can usefully identify rhetorical sub-types and connect arguments to their conclusions (Kienpointner and Kindt, 1997: 562). For example, one of Wodak's (2001: 73-77) argumentation types analyses rhetoric based on numbers. This *topos* (to borrow Wodak's terminology) follows the characteristic that if the numbers prove a specific argument, a specific action should be performed or not be carried out. Examples from the second act of the narrative show how the rhetoric of numbers was used in evidence-based policymaking to promote voucher schemes and privately managed schools to a global audience using data selected from a limited sample of cases.

When actors legitimise ideas or construct arguments in the textual data they are also generating narratives. Narratives are essentially representations in and of themselves (Riessman, 1993: 2). They form an integral part of doing discourse analysis on public policy as they simultaneously shape, create and become sources of meaning (Yanow, 2000: 58). Meanings created through narratives are actionable and performative in nature. This is because the beliefs of agents are drivers of their actions and desires, making narratives a form of explanation for the policies that are acted out in the real world (Bevir, 2006: 285). As we will also see in the second act of the narrative, a key plot that emerged from the data explained how the private sector was best placed to provide innovative solutions to improve education provision

to the poor through Public-private partnerships. This story of private sector as saviour faced opposition from a counter-narrative resentful of how corporations were replacing states as core providers of education. In sum, narrative modes of explanation together with legitimation and argumentation strategies are all considerable assets that add further value to IDA. True to the abductive nature of the approach, the next section outlines how IDA was refined during the analytical process.

3.5 Refinements to IDA

Discourse being an iterative process, there is much back and forth between theory, categorising data and coding. Consequently, there was a constant need to refine my chosen approach throughout the analysis. Much refinement occurred in the process of coding and categorising data. As coding progressed beyond the pilot study, the selection of which extracts to code became a constant concern. The coding experience evolved through multiple phases and various strategies were employed to manage the process. At first, a more open coding strategy was applied as the identification of actor beliefs gradually came into focus. At this stage there was a great deal of annotation to supplement coded material using the 'comments' feature on Adobe Reader to interpret actor beliefs from particular extracts. As more coding was completed, it also became necessary to return to documents and recode sections that grew in importance. This signalled the transition to a more focused coding strategy. An example of this was coding for instances of the word 'smart' as in smart investment. Another was coding for 'second chance' as a lexical item that connected the post-industrial concept of lifelong learning to poverty reduction strategies in less-prosperous countries. Using a more focused strategy prompted the coding of the same keywords that appeared repeatedly, and which represented the main concepts. It gradually became clear that seemingly more unusual soundbites and statistics provided useful data as these lend themselves well to critique in relation to the rival beliefs of other agents. Less conventional extracts also offered more interesting data for reportage during the earlier drafting of analytical chapters. The practical aspects of demonstrating what was coded and how it was coded also had to be worked through. It was decided that coding lists and

examples of coded texts need not dominate and interrupt the flow of the narrative. An example of a coded section of a core policy report (see Appendix 1) along with the coding lists for the vision, process and outcomes acts are presented separately to illustrate the thought processes of the analyst.

Throughout the analytical process the coding strategy was refined to accurately categorise data. Table 4 shows how the analytical themes, lower-level theories and topics corresponding to the three research questions evolved across three distinct phases of coding. This process involved ongoing revision of data categorisation into themes and topics plus the filtering-out of sub-plots and contextual items. For example, the knowledge economy was a category of analysis in the pilot phase but became contextual in later stages as it featured across all themes and symbolised education in the post-industrial age. Further coding informed decisions to transfer, delete, replace, prioritise and minimise categories as the process matured. Finally, themes took on storytelling significance and developed into a grand narrative that wove a thread through the discursive construction of the policy field covering the vision, process and outcomes. Topics were grouped around binaries through which actors conceptualised each act of the narrative about the liberal deal in international education.

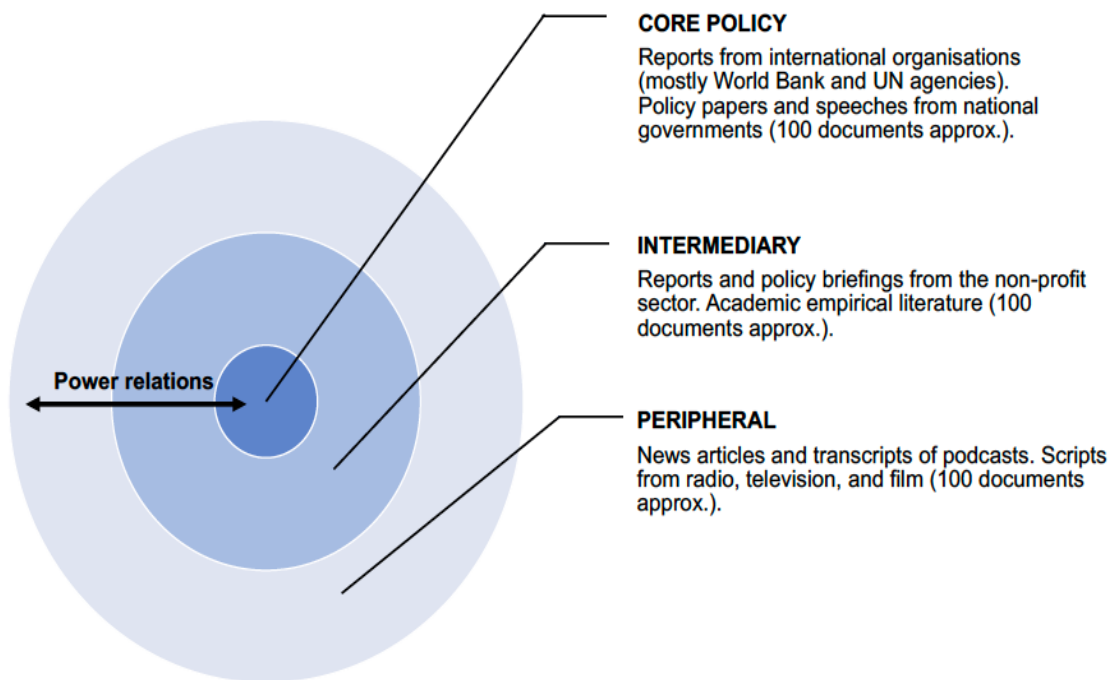
Using a thematic approach can lead to accusations of the analysis being too descriptive. However, as Todd (2016: 22-23) correctly points out, presenting analysis by themes is justified when investigating broad and complex policy dilemmas. There are benefits in revealing how the narrative evolved in terms of narrative themes being explored (e.g. vision, process), the positions of actors (e.g. neoliberal, humanist) and the various framings that emerged (e.g. lifelong learning as second chance education). These evolutionary stages correspond to the 'what', 'who' and 'how' of the analysis respectively. An additional benefit of the thematic approach is that it reveals how the discourse evolved in terms of the lower-level theories that served as an elaboration of the liberal theory of international education, as addressed in the each of the thematic categories. This explains the 'why' of the analysis.

Table 4. Evolution of analytical categories

	Pilot phase	Intermediate phase	Narrative phase
RQ1 Themes	<i>Neoliberal and human rights convergence</i>	<i>Human capital V human rights</i>	<i>Vision (Binary: economic/social good)</i>
RQ1 Topics	<ul style="list-style-type: none"> • Economic benefits • Social benefits • Mission • Inclusion • Liberal state reproduction 	<ul style="list-style-type: none"> • Economic benefits • Social benefits • Ethical mission • Inclusion • State building 	<ul style="list-style-type: none"> • Economic prosperity • Social progress • Human development • Inclusion • National security
RQ2 Themes	<i>Knowledge economy and corporatism</i>	<i>Management of the education system</i>	<i>Process (Binary: marketisation/humanisation)</i>
RQ2 Topics	<ul style="list-style-type: none"> • Value for money • Partnerships • Effectiveness • Legislation • Knowledge economy 	<ul style="list-style-type: none"> • Value for money • Partnerships • Effectiveness • Legislation • Accountability 	<ul style="list-style-type: none"> • Value for money • Partnerships • Accountability • Governance by measurement • Evidence-based policy
RQ3 Themes	<i>Global-national-local policy (plus uneven resources)</i>	<i>Education policy results</i>	<i>Outcomes (Binary: commodity/ progressive realisation of the right to education)</i>
RQ3 Topics	<ul style="list-style-type: none"> • Quality • Access and equality • Non-/in-formal education • Reform and governance • Accountability 	<ul style="list-style-type: none"> • Quality • Equal access • Lifelong Learning • Autonomy and participation • Financing and resourcing 	<ul style="list-style-type: none"> • Lifelong learning • Lifewide learning • Low-fee private schools • Language of instruction • Philanthropy

As coding and categorising progressed, issues regarding the sampling of documents and corpus design were addressed. Figure 6 sets out the finalised dimensions, contents and dynamics of the international education corpus which matured through the analytical process. Coded documents were ordered into a three-layered corpus representative of the entire epistemic community that discursively constructed the policy field. Designing the corpus in this way allows the power relations between the three levels to emerge during analysis, for example ways in which international education norms promoted in major institutional reports were reinforced in the media or challenged by pressure groups. The peripheral layer was easily defined as data from the mainstream media such as newspaper articles. However, it was more difficult to make a clear distinction between which texts were core policy documents and which were grey literature in the intermediary level. This was particularly problematic when classifying working papers and research reports published by international organisations but accredited to individuals. To resolve this, it was decided that the nodal texts would be policy documents published by international organisations and governments while individually credited papers were to be included in the intermediary tier of the corpus. A key question faced by most discourse analysts after much time spent stockpiling empirical data is when to stop collecting and coding documents. Therefore, determining the size of corpus was also a key concern. At first there was no clear number in mind and the aim was mainly to build a corpus that was representative and took documents from a diverse range of sources to fully reflect the diverse views of the entire epistemic community. However, looking at other similarly sized projects provided a good indicator of magnitude. For instance, Daddow's (2011) political discourse analysis incorporated roughly 300 empirical documents. Accordingly, it was decided that each layer of the corpus would include somewhere in the region of 100 coded sources. As coding proceeded for each layer of the corpus it became evident that sufficient data for each thematic topic could be gathered to the point that adding further sources would not have unearthed further significant findings.

Figure 6. The international education corpus



Just as coding forms a fundamental part of the analytical process, so too does the choice of visual displays and the method of writing up the analysis. Diagrams provide an effective way of clearly presenting qualitative interpretive research. Borrowing from Todd (2016), the themes and topics of each analytical chapter were visually illustrated using pentagrams. Doing so stimulated thought about the relationships between the scenes in each act, the priority ordering of scenes and the connections between scenes across the acts of the grand narrative. Making these linkages facilitated the logical flow of scenes into a broader narrative and helped draw conclusions from the analysis as a whole.

Turning our attention to writing, producing early drafts of the analytical acts stimulates the analyst's ability to think interpretively and understand the relationship between coding and writing as part of the analytical process. Through writing, the way the analyst moves from inside to outside the texts became clearer and allowed for a broader yet intimate view of the big picture to come into focus that would not have occurred in a dispassionate quantitative study. During the early stages of writing, questions and doubts arose about whether this was a 'good' analysis, prompted by the understanding that some interpretations are better than others. Confidence

in writing the analysis came from the certainty that firstly, narratives were beginning to form in the data, and secondly that the coding scheme was robust and allowed for categorisation of data without need for manipulation. A key refinement in the writing process arose from the issue of too crudely contrasting rival beliefs, for instance humanitarian and neoliberal values, in early drafts. Overcoming this involved more detailed excavation of the data to unearth the critical reflections of actors in the discourse that revealed the limitations of the agendas they sponsored. Doing so stimulated the reportage to highlight contradictions in the beliefs of actors and stratify agential positions. It was this complexity of actor positions that prompted agential leanings tables to be appended to each act of the analysis in order to bring clarity to the ideological camps that actors and institutions most closely aligned with. These are 'lower case' ideologies that run through policy practices and shape political discourse but which are 'not openly acknowledged in or by them' (Daddow, 2011: 82). The four ideological leanings that influenced the beliefs of institutions and individuals in international education were: neoliberal, small 'l' liberal, anti-neoliberal and humanist. Remaining mindful of these agential leanings during writing also flagged up contradictory instances of rival ideologically-based beliefs reinforcing one another, for example when more typical (or, small 'l') liberal institutions expressed views that reflected neoliberal or humanist values, as often occurred in the GMRs published annually by UNESCO.

A final refinement in writing up the analysis concerned the micro-structure and the organisation of reportage through which to narrate the discursive construction of the liberal education model. Whereas the macro-structure pertains to how the analysis is presented as a logical whole in terms of the research design and overarching arguments, the microstructure is concerned with clear presentation of the analysis via linking data to themes, presenting extracts and providing interpretations (Silverman, 2013: 366). As is observable in the three acts that follow, Weaver-Hightower's (2019: 114) 'Setup, Quotation, Commentary' model proved an effective approach to reporting the analysis. In applying this model, each piece of data proceeds with a setup indicating the point being made and describes the source in terms of names, positions, dates, etc. Context is also added to

give background to the situation in which the quote was made. The quotation follows with an extract selected from the data that is topically relevant but also to-the-point and interesting. To ensure variety in the reportage a mixture of longer block quotes (40 words or more), sentences and keywords works was decided on. At the end of each quote is a commentary section clearly explaining how the quote relates to the analytical topic and the argument being made. The aim here is to state what is not obvious to the reader such as the analysts' theoretical interpretation of the extract and how the quote proves the point being made. Aware that this model is not a rigid and unbreakable formula, it was applied flexibly and improvised upon during the writing up stage. However, every effort was made to ensure that each extract was supported by context and interpretation. To ensure that an interpretive terminology was consistently applied in the later stages of draft writing, a discourse analytical phrasebank was produced for the setup and commentary parts borrowing from the writings of expert analysts. For instance, for the commentary framing phrases such as 'these quotes sought to frame A as B...' or theoretical interpretation phrases like 'the main analytical observation to be drawn from this quotation is...' were adapted from Todd's (2016) interpretive phraseology.

3.6 Limitations and Weaknesses of IDA

Broadly speaking there are two possible sets of critique of the IDA approach applied in this study. The firstly concerns criticisms of interpretive methods from quantitative perspectives. One major limitation faced by discourse analysts of public policy is having positivist criteria that they ultimately reject brought to bear on them (Yanow, 2006: 9). Being held to account by traditional definitions of validity guarantees that interpretive policy research fails the test before it has even begun. Research judged as unfaithful to the positivist paradigm and straying from the benchmarks set for generating and testing theory in the quest for knowledge is considered insufficiently robust (Turner, 1985). This limitation has been addressed by interpretive researchers. Aware that their research can't and shouldn't be judged in full by the standards of quantitative methods due to differences in their epistemological and ontological beliefs, an alternative set of evaluative

standards were drawn up based on the overarching principle of 'trustworthiness' in interpretive research (Guba, 1981; Lincoln and Guba, 1985).

Lincoln and Guba (1985) present a revised set of evaluative standards that enable interpretive work to be judged on equivalent lines to positivist research and provide techniques for meeting various standards. As an alternative to internal validity in mainstream research, *credibility* seeks to check the inherent value of analysis. This is done in the understanding that analysts agree reality is socially constructed. One technique for insuring credibility is prolonged engagement, wherein researchers expose themselves to the issues under investigation for an extended period of time. This is achieved through prolonged periods spent academically engaged in the policy field and immersion in the relevant literature. Acting as an alternative to external validity used in mainstream inquiry, *transferability* keeps check on the level to which conclusions drawn from analysis can be generalisable. One technique to improve the transferability of interpretive research is derived from thick description (Geertz, 1973). Approaches such as IPA and DHA embrace thick description which is achieved through 'a nuanced portrait of the cultural layers that inform the researcher's interpretation of interactions and events' (Schwartz-Shea, 2006:101). The principle of reliability is substituted with the standard of *dependability* and seeks to discover whether similar results would be produced if the same research design was repeated under similar conditions. Lincoln and Guba (1985: 317) suggest 'stepwise replication' as one way of boosting dependability. The present study implemented this technique during the coding pilot study by collaborating with a co-analyst to check for inter-coder reliability. Another method involves fellow discourse analysts reviewing each other's research to pass judgement on standards of work and then suggesting refinements, modifications and improvements where necessary (Howarth, 2000: 142). Finally, the standard of *confirmability* acts as an equivalent to objectivity in which the focus is centred more on the data than researcher's role. Confirmability can be enhanced by practicing reflexivity in social research wherein analysts reflect critically on their interpretations (Bourdieu and Wacquant, 1992). One reflexive technique suggested by

Lincoln and Guba (1985:319) is the audit trail. This entails keeping meticulous records of everything produced in the analytical process such as field notes, coded documents, mindmaps and drafts manuscripts.

A second challenge concerns internal critiques between rival variants of the discourse method. Critical forms of discourse analysis also faced challenge from within the discursive research community as variants vied for credibility. The validity of CDA has been criticised for being impressionistic. Put differently, that it is overly subjective and unsystematic. Analysts using variants of CDA were accused of demonstrating a lack of systematic rigour and failing to be sufficiently explicit about analytical procedures (Stubbs, 1997). The objectivity of CDA approaches was also placed under scrutiny for the role that the investigator plays during analysis. Analysts were charged with producing biased research in which prejudicial analysts discovered traces of ideologies they actually set out to find within a text (Widdowson, 1995; Slembrouck, 2001).

Both criticisms were targeted at earlier critical discourse research. The first wave, strongly influenced by Faircloughian CDA, was heavily Marxist and radical its approach. Its idealism exposed analysts to claims of impressionism and political bias. The second wave of discourse analysis responded to critics with systematic upgrades. One way that analysts systematised their research was by providing procedures for conducting particular approaches. The CDA tradition moved beyond general guidelines to guide analysis by suggesting a more systematic procedure for analysts to follow (Fairclough, 2003). Others created comprehensive toolkits including explicit instructions of how to conduct discourse analysis (Gee, 2011). Discourse analysts in the field of foreign policy became transparent about their coding practices by clearly presenting coding lists and providing examples of coded texts (Daddow, 2011). Systematicity is a means of objectifying research and opening it up to potential re-validation and scrutiny. Aware of this need for clearer steps and well-defined levels of analysis, IDA builds upon these systematic upgrades to ensure as reliable an approach as possible. Finally, updated discourse approaches also tackled charges of impressionism. This was partly achieved by taking up less-radical

positions than earlier emancipatory analysts and aiming for a more empathetic analysis (Wodak, 2001; Yanow, 2000). Retaining empathy with the ideas and motives of a diverse range of actors was important for the author when working with the empirical data in this study since taking an anti-neoliberal or pro-human rights position would have cast doubt on the credibility of the research, and IDA as a method. Furthermore, an emancipatory stance would have compromised the empirical implications of the study as a route towards arbitration.

3.7 Summary

This chapter has introduced and justified IDA as an interpretivist and discursive research design capable of explaining how the dominant liberal education model was discursively constructed as a grand narrative. Taking a broad conception of discourse that puts language in relation to its broader social, cultural and historical context allows for an analysis that unlocks the processes behind meaning-making in policy issues. IDA offers a novel and tailored approach that provides the analytical tools necessary to reveal the intersubjective tensions that destabilise the seemingly harmonious liberal deal. Though not without its weaknesses, the discourse method has been proven to be trustworthy by demonstrating how it meets a wide range of scientific criteria that evaluates the standards of qualitative interpretive research. This chapter has outlined how, through carefully piloting of the approach, adherence to a set of systematic analytical procedures and constant methodological refinement at each stage of the research process, little more could have been done to guarantee the rigour of this study. Having outlined the research design in detail, let's observe the effects of applying IDA to the corpus as we turn to the first act of the narrative construction of education in the promotion of international development.

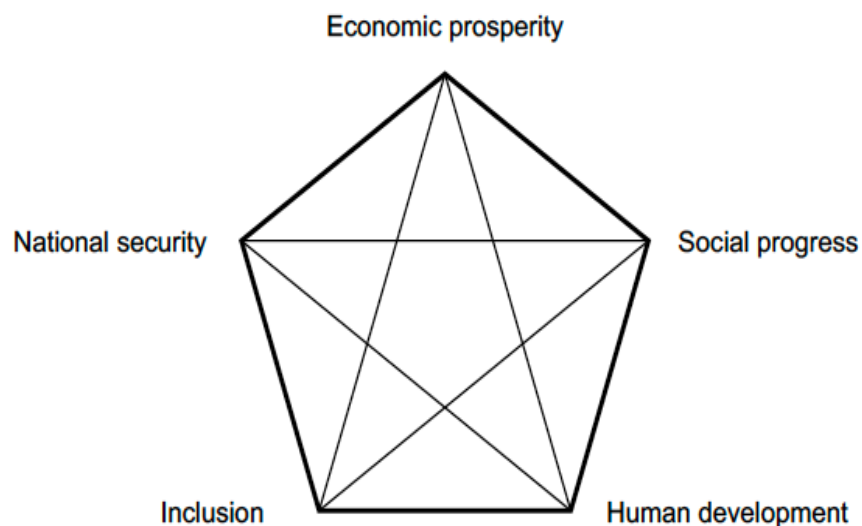
Act I: Aspirations in the Liberal Model of International Education: The Vision

This opening act of the grand narrative explores the aspirations actors held for education and analyses how the rival beliefs of actors and institutions discursively constructed the vision of international education. In doing so it addresses the first research question: *What kind of vision drove the global education agenda between 2000 and 2020?*

On its surface, the liberal vision appeared cohesive but leafing through the script of the scenes in this act of the narrative tells a story riven by tension. Fundamentally, the vision explores the hopes actors had for learning and serves as an entry point for addressing broader theoretical concerns over economic aspects of the liberal education model. Driving the tensions embedded in this particular act was a lower level of theory centred around a dispute over whether education constituted an economic good. This served the analysis by directing the coding of topics and eliciting keywords in the coding scheme (presented in Appendix 2). More specifically, this lower tier of theory was organised around a binary debate over what was driving the vision: the dynamic of education as an economic good aligned with economic liberalism that prioritised higher incomes and greater levels of GDP, or rival interpretations of education as a social good placing emphasis on aspects of human empowerment and civic participation. It was the conflicted poles of this binary debate that elicited the five scenes comprising this opening act. These scenes (presented in figure 7) are arranged in a clockwise order according to their importance in shaping the act with economic prosperity as the dominant aspect of the vision. Drawing out the embedded disputes buried within each scene of the vision forms an initial step on the path towards the resolution of this policy dilemma.

Constructing the vision in this manner reveals how the supposedly agreed 'liberal' aspirations actors held for international education were far from harmonious and highlights the beliefs advancing alternative perspectives. These intersubjective tensions are traceable to a diverse set of values that align with competing ideological tendencies. Appendix 3 presents the ideological leanings of the actors and institutions who shaped the vision of international education. While shining a light on these tensions, the analysis takes an empathetic approach to these frictions and accepts that any such diverse band of actors attempting to form a coherent set of aspirations for a public policy realm as complex as this would suffer from internal tension. Nevertheless, the value of IDA is such that it exposes these tensions whereas other analytical approaches may neglect them. Overall, this chapter provides the basis on which to begin identifying shifts in international education norms that indicate wider political changes and continuities in the discourse.

Figure 7. The vision



Five scenes emerged from the theoretical debate over education as an economic or a social good, and these will each be explored to reveal the competing representations that discursively constructed each part of the vision. Scene one investigates the drive for a prosperous economy which was the most powerful dynamic driving the vision of international education.

The hope was one of transforming the underprivileged into an educated populous that contributed to national growth and the global economy in the context of a post-industrial society released from Keynesian economic strategy and the welfare state model. The scenes that follow illustrate how economic beliefs were challenged or reinforced by other salient topics that discursively shaped the vision. Scene two explores social progress and how concerns over public health and the advancement of individual attributes countered the dominant pursuit for prosperity. The third scene examines tensions in human development and how various framings of this notion were torn between humanist and neoliberal logic. In spite of their lower priority order in the construction of the vision, inclusion and national security also deserve attention in this act of the narrative. Scene four explores how a shrinking tolerance of various forms of exclusion further limited the superiority of economic matters and handed education a key role in social inclusion. The final scene investigates how instability caused by conflict between 2000 and 2020 elevated education in importance against the policy background that merged development and security concerns. This is followed by a summary of the act and an interpretation of the discursive shifts that indicate initial instances of policy continuity and change unearthed through the grand narrative.

4.1 Scene I: Economic Prosperity

This scene explores the beliefs behind economic prosperity which remained a dominant aspect of the vision throughout the period of study. It shows how, although maintained as a powerful norm by neoliberal-leaning thinkers and institutions, rival beliefs challenged and mitigated against support for education as an economic investment opportunity. The first section sets the scene by establishing the knowledge economy as the key context and identifying its historical fault lines. Section two highlights the tensions around the intertextual spread of rates of return statistics that supported economic aspirations. The scene then explores the powerful norm of education as a driver of national wealth alongside the counter-narrative that challenged this economising logic.

4.1.1 Education, Wealth and the Knowledge Economy

Understanding the dominance of economic prosperity in the aspirations for international education requires first establishing the 'knowledge economy' as a key part of the historical context. The term was first used as a chapter title in the book *The Age of Discontinuity* by the founder of modern management Peter Drucker to signal a post-industrial economy that replaced production of physical products with ideas and information. Drucker (1969: 251) stated that 'Knowledge is fast becoming the foundation for skill. We are using knowledge increasingly to enable people to acquire skills of a very advanced kind fast and successfully.' The social analyst Daniel Bell (1973: 19) agreed, noting that 'Post-industrial society is organized around knowledge, for the purpose of social control and the directing of innovation and change.' Here we observe the emergence of knowledge as a dominant factor of production in the transformation of traditional societies built around industrial forms of manufacturing to those in which information and technology took precedence. Alongside this, a growing sense of urgency for greater knowledge and human ability to survive and meet the high levels of productivity demanded by the modern economy became established as an influential utilitarian norm. In his studies into the virtual organisation, the philosopher Charles Handy (1995) endorsed this perspective, noting that workers in the knowledge economy

must either 'adapt or die', adding that survival depended on being 'flexible enough to change when times and customers demand it'. The economist Diane Coyle (1999) made a similar point, arguing that 'The key to understanding many trends in the modern, weightless or knowledge-based economy is rather to think about humans as machines.' These quotes sought to frame individuals as economic inputs and reflected the dehumanising effects of beliefs around education as an investment when expressed in the context of the knowledge economy.

The belief that higher levels of individual skill were essential to thrive in the knowledge economy gained institutional support. The OECD was an important voice in the framing of aspirations for education that cohered with transformation towards the knowledge economy as it emerged as a major actor in international education via its Centre for Educational Research and Innovation. A report by the Centre argued that 'There has been a shift in economic development in the direction of a more important role for knowledge production and learning' (OECD, 2000a: 28). The World Bank (2003a: xvii) was also a highly influential voice here, noting that 'The global knowledge economy is transforming the demands of the labor market throughout the world. It is also placing new demands on citizens, who need more skills and knowledge to be able to function in their day-to-day lives.' These quotes show how both institutions legitimated the notion of education as an economic good by emphasising the greater skill levels, especially those derived from tertiary education, and innovation required to compete in the global knowledge economy. This line was supported in a combined report between UNESCO and the World Bank produced by the Task Force on Higher Education and Society (2000: 9) which stated 'The world economy is changing as knowledge supplants physical capital as the source of present (and future) wealth. Technology is driving much of this process.' In this quote knowledge is framed as an economic investment as if the two were synonymous. That said, concessions were also made by the World Bank to the social nature of education in connection to knowledge societies. At times the Bank (2002a: xix) softened its tone to acknowledge education as 'a holistic system that includes not only the human capital contribution of tertiary education but also its critical humanistic and social capital building

dimensions and its role as an important global public good.’ This compromise was also echoed in reports by chief education economists at the World Bank Harry Patrinos and George Psacharopoulos (2011: 22) who acknowledged favourable ‘spillover effects’ gained from higher levels of education ‘as more people are able to learn and share knowledge’. The main analytical observation to be drawn from these quotes is that attitudes towards education as an economic investment, although still prominent in the discourse, already showed signs of depreciation in the 2000s. This tendency can be traced back to conflicted beliefs apparent in classic scholarly debates over the role of humans in knowledge generation to spur national development.

Concerns over the notion of people as conduits of knowledge to serve the global economy are rooted in the historical context of aspirations for education as economic prosperity. One wave of criticism originates from traditional humanist beliefs about the role of the humanities in knowledge production. Central to this was the ‘two cultures’ debate between Charles Snow and Frank Leavis. The debate was initiated by the 1959 Rede Lecture given by Snow (2012: 47) in which he asserted ‘As important as capital, is men. That is, trained scientists and engineers adaptable enough to devote themselves to a foreign country’s industrialisation for at least ten years out of their lives.’ Here, Snow displayed a commitment to utilitarian thinking by representing knowledge as scientific expertise necessary to drive the wealth of nations. Frank Leavis, however, was critical of this scientific framing of knowledge. In his 1962 rebuttal lecture Leavis argued:

What we need, and shall continue to need not less, is something with the livingness of the deepest vital instinct; as intelligence, a power – rooted, strong in experience, and supremely human – of creative response to the new challenges of time; something that is alien to either of Snow’s cultures. (Leavis, 2013: 73)

This extract shows Leavis advancing a humanistic line of argumentation. Human nature was of greater concern to the literary culture and was a fundamental force in the context of rapid advances on science and

technology. He framed the advance of scientific logic accompanied by technological change as a threat to humanity. For Leavis, human nature rather than science was at the foundation of knowledge and this resonates strongly with contemporary academic arguments over education as a social good that shaped the counter-narrative.

Remnants of these suspicions could be detected in arguments challenging economic beliefs over education perceived as responsible for informing the neoliberal shift from industrial strategies towards the employability agenda. Critical of Daniel Bell's (1973) influential prediction that future post-industrial societies would be characterised by a socially-oriented diffusion of technology working for the public good, the sociologist Bob Jessop took this argument further. Turning this prediction on its head, Jessop (2008: 14) argued that 'The production and uses of knowledge have become increasingly subordinate to an "economizing" logic oriented to profit-and-loss calculation.' The post-colonial scholars Joel Samoff and Bidemi Carrol also had a sceptical take on knowledge norms in the international context of the knowledge economy:

The centralization of the determination of what is knowledge entrenches the role of the elite education and research institutions in the world, nearly all located in the most affluent countries. What is deemed to be the important knowledge is likely to become more technical and less humanistic and critical. (Samoff and Carrol, 2003: 39)

What the authors seem to have been trying to convey was that a global division of knowledge was playing. They clearly employ a social justice line of argumentation to raise doubts over the kinds of knowledge needed, who would decide this and ultimately over the distribution of knowledge in the promotion of international development. Taken together, these debates indicate the tensions around the knowledge economy that formed a major contextual backdrop for representations of economic prosperity which dominated the vision of international education.

4.1.2 Statistical Soundbites

A key way of framing aspirations for education as economic prosperity was through the intertextual spread of rates of return statistics. Instances of intertextuality were powerful in that they perpetuated the norm of education as an economic good, especially since statistical soundbites entered media coverage of international education in poorer nations. Gender, a dominant theme in the EFA goals during the period, was also a key element in statistical data. One example of a powerful statistic that became a persuasive soundbite was based on returns to the individual through earnings. The 2005 GMR stated 'One standard deviation increase in test scores was associated with wage increases ranging from 12% to 48%, suggesting a substantial return to higher levels of cognitive skills and probably, therefore, to higher levels of school quality' (UNESCO, 2005: 41). This data was referenced to research produced for the World Bank by the economists Eric Hanushek and Ludger Woessman who standardised the results from three studies carried out between 1999 and 2003. The aggregated findings, it was argued, presented 'direct and quite consistent estimates of the impact of test performance on earnings' (Hanushek and Woessmann, 2007: 7). Other works by both authors were cited in the 2005 GMR which also credited Hanushek for his preparation of background papers.

One classic example of this intertextual sharing of data was a statistic on private returns to girls' education. In her article for *Africa News* focusing on education in Kenya, the development scholar Esther Ngumbi (2017) recounted a well-travelled statistic: 'Each additional year that a girl attends school can increase her earning power by 10 to 20 percent.' This statistic also featured in reports by large corporations with similar interests in the challenges facing the Kenyan education system. For example, it appeared in a press release by the Mastercard Foundation (2011) to announce its Wings to Fly partnership with the Equity Group Foundation to establish a secondary education scholarship scheme and leadership programme. Both mentions carried a sharper neoliberal edge of raw rates of return that had been blunted in previous uses of the statistic by DfID which added socially liberal benefits to the extra year of girls' schooling. As International Development Secretary of the UK coalition government, Andrew Mitchell

used the same data to justify Nick Clegg's increase 355m foreign aid pledge to educate girls in poorer countries while austerity measures were being imposed in Britain. In addition to increased earning potential, Mitchell added that the extra year of schooling would also contribute to 'lowering birth rates' (Hall, 2011). The same statistic appeared several years later in DfID's (2013b: 6) Education Position Paper. Nick Hurd, delivering a speech as DFID Parliamentary Under Secretary of State, also made use of the data. This time adding an extra social benefit to the 10-20% increase in earnings: 'most of which is likely to be reinvested in her family and community' (Hurd, 2016). Tracing this statistic to its origin leads us to an article authored by the leading World Bank education economists George Psacharopoulos and Harry Patrinos (2004: 116) which reported higher returns to secondary education in women. USAID (2008: 2) employed similar statistics, stating that 'women experience an 18 percent return on secondary education, versus 14 percent for boys.'

In addition to statistical soundbites concerning returns to the individual, data supporting the dominant aspiration for economic prosperity also emphasised the benefits of education to the wider economy. DfID (2013a) noted that 'An extra year of good schooling lifts a country's yearly economic growth by 1%, making poor countries richer and, in the long run, less in need of foreign aid – and more able to trade.' This data and its underlying neoliberal thinking influenced the discourse of humanist-leaning organisations. When using the same statistic to argue the case for investment in education, UNICEF (2015: 6) conceded that 'There remains little doubt about education's causal role.' This often-cited statistic could be traced back to a paper on British education policy by the economists Barbara Sianesi and John Van Reenen (2003: 195) that stated 'Increasing school enrolment rates by one percentage points leads to an increase in per capita GDP growth of between 1 and 3 percentage points.' Drawn from a review of multiple rates of return studies which used economic regression analysis, this statistic highlights how beliefs about education as an investment at the UK national level shaped the foreign policy discourse on international education.

Such was the volume of the intertextuality of these soundbites and the power they wielded in the international education discourse, it proved difficult for rival actors to challenge rates of return statistical norms. Initial concerns over cost-benefit calculations were marginalised. For example, in a working paper for the World Bank, the welfare economist Jean-Pierre Jallade (1973: 2) mused 'The technical shortcomings of rates of return calculations for education have aroused widespread scepticism.' This suspicion over what could be described as nebulous education statistics endured and was picked up by the BBC Radio 4 programme *More or Less*. One particular statistic, and variations of it, was selected by the show as particularly obscure: '60% of eleven-year olds will leave school to do jobs that have not yet been invented' (Sander, 2017). The data was traced to the work of educationalist Cathy Davidson (2011: 18) who affirmed that '65 percent of children entering gradeschool this year will end up working in career that haven't even been invented yet.' However, in the international education corpus, variations of this statistic were traced further back to a report in the OECD series *What Works in Innovation in Education*: 'Linear careers are disappearing and by 2010 many of today's 18-year-olds will be doing a job that has not yet been invented. Moreover, they will be using skills that do not currently exist.' (OECD, 2000c: 19). This statistic bears some resemblance to the words of the philosopher Eric Hoffer quoted by the (World Bank, 2003a: 21): 'In a time of drastic change, it is the learners who inherit the future. The learned find themselves equipped to live in a world that no longer exists.' A variant of this quote was also discovered in a White Paper by the UK Department for Children, School, and Families (DfCSF) which noted that 'Many of today's most popular graduate jobs did not exist 20 years ago' (DfCSF, 2009: 5). With this, a strong norm had built around the idea that traditional skills were not considered relevant or fit to thrive in the knowledge economy and that cutting-edge ideas were necessary to drive innovation.

This dominant belief was challenged by the educationalist Daisy Christodoulou (2014: 50) who worried about the implications of this for learning, specifically that 'there was no point in wasting time teaching (pupils) knowledge that would be useless to their future careers,' adding

that 'these ideas clearly owe a lot to modern economic theorists and management consultants.' What Christodoulou seems to have been trying to convey was that this statistic had caused a dangerous shift in the meaning of knowledge that undermined the foundational skills underpinning technological advances and with it traditional educational values. Sections of the media were similarly critical of this economic logic. For example, in an article for *The Guardian* the social justice advocate Claire Provost (2012) argued 'Putting a price on illiteracy helps promote a crude calculus whereby education is valuable insofar as it gets people working, spending and paying taxes.' She concluded that 'This risks prematurely closing debate on a key question: what, exactly, is education for?' (Provost, 2012). The assumption here was that rates of return statistics perpetuated a calculated and neoliberal-inspired understanding of education that posed a threat to growing people-centred interpretations challenging the dominant idea that education constituted an economic good. A key element of this dominant understanding of education was based around creating and sustaining national prosperity.

4.1.3 The Wealth of Nations

Through the analysis, the wealth of nations emerged as a dominant norm that worked to support economic prosperity as the most important aspect of the vision which proved difficult to challenge. The influence of compelling arguments in favour of education as a means of driving the wealth of nations was evident throughout the discourse. For example, the power of this norm was clear from the news media of poorer countries. In an article for *The Nation*, the journalist Kimani Wa Njuguna (2012) affirmed that in Kenya 'high levels of education contribute to faster GDP growth.' In a newspaper interview investigating the most pressing development concerns in the post-2015 era, Nisha Arunatilake of the Institute of Policy Studies in Sri Lanka agreed, noting that 'Increasingly we see that the lack of skills and talent is an obstacle for growth' (Daily Financial Times, 2014). Here we can see language similar to that used in the education strategies of major donors. This unquestioned linking of education and economic development in the donor discourse was eulogised in the 2020 Education Strategy proposed by the World Bank (2011: i): 'Simply put, investments in quality education lead

to more rapid and sustainable economic growth and development.’ That this dominant belief driving the post-2015 vision of international education was a continuation in the messaging of major donors became evident from analysing earlier policy reports by DfID and USAID. For example, international development policy under the UK New Labour government employed a cautionary tale to legitimise this belief: ‘Without improved levels of education, sustained and broad-based economic growth will not take place’ (DfID, 2001: 8). US development policy strategy papers were perhaps more explicit in their belief that education was an economic good: ‘Education builds human capital, which is fundamental to economic growth. In countries with growth-friendly policies and institutions, investments in education contribute to growth’ (USAID, 2005: 2). This points to the major role played by bilateral and multi-lateral donor actors in legitimating beliefs about education’s role in the wealth of nations which was further reinforced by powerful historical arguments.

The most commonly cited historical example was the rags to riches narrative of East Asian ‘tiger economies’. USAID used this story to justify its continued financial development assistance for basic education in poorer countries. Citing the 1993 World Bank report *The East Asian Miracle*, USAID (2000: 7) endorsed this argument stating that ‘[a] study of the high-performing economies of East Asia concluded that their investment in education was among the most important factors in the rapid growth of these countries.’ This line of argument was sustained throughout the period of the study and featured in the 2018 World Development Report (WDR): ‘Korea understood that education was the best way to pull itself out of economic misery’ (World Bank, 2018: xi). This enduring *topos* of history added to the persuasiveness of the idea that similar success could be replicated in other low-income countries that followed the economic mission. Another example from history concerns UNICEF and how the agency supported the wealth of nations narrative as it broke away from its narrower humanitarian focus to consider children’s needs in the context of wider society. Describing this change in perspective, Maggie Black noted:

One influence was the mounting evidence that education was the key to economic advance: in the era of development, many countries were not able to absorb technology and financial investment because they did not have enough administrators or trained man-power. Education would solve this by building up the 'human capital'. The idea that people were a natural asset, like a rich load of ore waiting to be mined, was central to development thinking. (Black, 1996: 215-216)

This quote clearly shows how the wealth of nations norm underpinned by 'human capital' investment logic infiltrated UNICEF's thinking on education. Of further interest in this extract is the 'ore' analogy used to legitimise the change in perspective at UNICEF by making a positive comparison with natural resources.

Although the linkages between education and growth notionally advanced the wealth of nations as a powerful norm in the discourse, counter-narratives were deployed to disrupt this causal relationship. Katarina Tomaševski, the first incumbent of the role of UN Special Rapporteur on the Right to Education (from hereon, Special Rapporteur), was the most important voice here. Tomaševski cast doubt on these linkages: 'There is no automatic association between the wealth of a country and its educational performance. The USA has lower enrolments than Argentina. Latin America shows the greatest growth in free and compulsory education, despite many obstacles' (Tomaševski, 2006b: 5). The dominant logic that framed individuals as subservient to economic forces was challenged by questions raised over who was serving whom? This humanistic counter-framing led by Tomaševski, and continued by subsequent Special Rapporteurs, was further invigorated by discontent over how previous critiques, notably the capabilities approach developed by Amartya Sen and Martha Nussbaum, had been absorbed and diluted by global economic frameworks (see Human Development scene). Driving this counter-narrative was the argument that education had been apprehended and that human skills and knowledge were being put to work for the good of the economy. It therefore addressed theoretical concerns over liberal economic

beliefs driving financial aspirations for education and deployed elements of Foucault's thinking on biopolitics against it. In her first progress report as Special Rapporteur, Tomaševski pointed to 'the impoverishment of education that would result from a sole focus on economically relevant skills and knowledge' (UNCHR, 2000a: 4). She went on to note that humanistic checks and balances were necessary 'lest the underlying idea of the market value of human capital risks turning upside-down the idea that the economy should serve people rather than the other way around' (UNCHR, 2000a: 23). These quotes resonate strongly with the liberal economic values that were directly under attack here as Tomaševski sought to frame education in a social and humanistic sense distinct from the workings of the global economy. An article by the education scholar W. John Morgan and Ian White, formerly International Affairs Officer at the World Bank, too stated that 'Economic development must be at the service of the more global development of individuals and communities, rather than the reverse' (Morgan and White, 2013: 42). This quote indicates that the influence of this counter-narrative went some way towards softening the wealth of nations sub-plot in the international education agenda.

To summarise this scene, prosperity proved to be the primary and dominant aspect in the vision of international education over the period of study. The analysis revealed how the primacy of economised aspirations was maintained by powerful institutional actors, notably the World Bank, DfID and USAID. In spite of this, discursive tensions indicated signs of a gradual weakening of faith in logic that deemed education an economic investment. Difficult though these powerful aspirations for national and individual wealth proved to argue against, the following scene highlights how framings around social advancements informed by rival beliefs further destabilised the vision.

4.2 Scene II: Social Progress

This scene explores how the social benefits of education, both to the individual and wider society, were represented to elevate social progress as a significant part of the vision. It investigates how framings of education centred around promoting health and fostering socialisation both challenged and reinforced the proposition that education was an economic good. Section one explores tensions in the dominant health of nations narrative as social ideas conflicted with the prevailing economising logic. The second section investigates rival framings of socialisation that further added to tensions in the vision of international education.

4.2.1 The Health of Nations

This section observes competing framings of health in the discourse. Tensions over whether education constituted a social or economic good were prominent, especially concerning the extent to which health benefits derived from learning were to meant serve people or the economy. In his book *The Health of Nations*, the political scientist Andrew Price-Smith provided some context to these pressures. Considering health as a key factor in the development of poorer nations, Price-Smith wrote:

The negative effects of infectious disease in the domain of economic productivity include reductions in GDP and in government expenditure per capita, decreases in worker productivity, labor shortages and increased absenteeism, higher costs imposed on household units (particularly on the poor), reductions in per capita income, reduced savings, and increases in income inequalities within a society that may in turn generate increased governance problems. (Price-Smith, 2002: 13)

From this quote we can see that the economy was foremost in the mind of Price-Smith, his underlying concern being that poor health limited 'economic productivity' and increased social 'inequalities'. Price-Smith's book was of contextual significance to framings of social progress in the vision of international education for two reasons. Firstly, his work was of greatest

relevance to poorer nations that had less capacity to deal with serious public health issues. Secondly, Price-Smith ranked investment in skills as the most important attribute of building state capacity due to its contribution to productivity. The author went on to note that 'Rising prevalence of infectious disease has a strong negative effect on the ability of the state to provide for the education of its citizens,' which in turn serves to 'undermine the formation and consolidation of human capital within affected societies' (Price-Smith, 2002: 54). In other words, poor health was believed to be a barrier to economic development because it placed limitations on state schooling and thus the generation of knowledge and skills.

This health of nations narrative linking education, health and the economy, along with its underlying neoliberal ideology, was prominent in the literature of donors and international organisations. Setting out its position in the debate, DfID (2013b: 2) argued 'Education enables people to live healthier and more productive lives.' The foundational logic was that since unhealthy people had low levels of productivity, investing in education would foster healthy lifestyles therefore increasing work rate and output levels. Perhaps the most important institution in supporting the health of nations narrative was the OECD. One report by the Organisation quoted the findings of key economists, stating that 'More educated individuals are less likely to smoke or to drink heavily. An additional year of schooling has been estimated to reduce average daily cigarette consumption by 1.6 for men and 1.1 for women' (Wolfe and Haveman, 2001 cited in OECD, 2001: 33). Here we see how the OECD intertextualised data resembling rates of return statistics (observed in the previous scene) to frame education as a means of encouraging healthy lifestyles that would result in savings on public health spending. Another OECD report incorporated the results of a British analysis concerning the impact of learning on female mental health: 'Raising the level of adult women without qualifications to a basic qualification level would reduce the risk of depression at age 42 from 26% to 22%, saving an estimated £200 million annually' (OECD, 2007b: 14). By presenting the health benefits of education through rates of returns and emphasising the 'saving' on public spending, what the OECD seems to have been trying to convey was that education was indeed an economic good.

The health of nations narrative and the economic representations of healthy living that buttressed it were challenged by rival actors, with gender concerns central in the counter-framings. The education and development expert Kevin Watkins was an important voice here, addressing issues of public health by focusing on how the empowerment individuals gained from learning resulted in healthier lives for the poor. More broadly, Watkins (2000: 29) argued 'Education influences health outcomes through a variety of channels. Increased access to information, changing attitudes, and increased confidence are among the most important.' Taking a more gendered view, Watkins (2000: 17) similarly affirmed that 'Educated women and their children enjoy better health than their uneducated counterparts, partly because they have better access to information; but also because they are more confident and assertive in demanding services.' This quote shows Watkins making the claim that the purpose of education was to build human capability and impart knowledge of how to stay healthy through general wellbeing along with prevention and mitigation of illness. Furthermore, and perhaps of even greater political significance, that a quality education empowers poorer women and communities to rise up and challenge healthcare provision in situations where levels of care could be deemed unacceptable.

Another aspect of the counter-narrative advancing the claim of education as a social good centred on women's education as a means of preventing HIV/AIDS infections. The power of education as a weapon to battle HIV/AIDS through awareness and sex health education gained media attention. In an article for the *Daily Express*, the political editor Macer Hall (2011) stated 'Girls in developing countries who have been through secondary education are less likely to marry in adolescence, will have fewer children and will avoid becoming HIV positive.' This media attention given to education as an effective form of HIV/AIDS prevention was reflective of a gradual tilting of the international education discourse that honed in on the social empowerment benefits of learning in relation to health during the period of study. HIV/AIDS in particular was mainstreamed into the discourse with health taking a notable position in the Dakar Framework for Action to

achieve the EFA targets. Associated with the reaffirmation of the six education goals, the UN 10-year Girls Education Initiative (UNGEI) was a programme focused on HIV/AIDS prevention and targeted poorer girls as an at-risk group. In his address unveiling UNGEI at the 2000 World Education Forum, the UN Secretary-General of the United Nations Kofi Annan (2000) stated 'Deprived of basic schooling, they are denied information about how to protect themselves against the virus. Without the benefits of an education, they risk being forced into early sexual relations, and thereby becoming infected.' Here Annan used a humanistic framing of the education-health nexus to underscore the importance of learning in HIV/AIDS prevention. The words of his speech echoed article 10 of the UN Convention on the Elimination of all Forms of Discrimination against Women (CEDAW, 1979: 4) which stressed 'Access to specific educational information to help to ensure the health and well-being of families, including information and advice on family planning.' The main analytical observation to be drawn here is that the lines of argumentation about law and rights were used to promote a framing of education for health that was oriented towards girls' empowerment and social wellbeing.

This representation was performative to the extent that institutional concessions were made on the social benefits that could be derived from better health resulting from learning. For instance, education was at the heart of the World Bank's efforts to mainstream the HIV/AIDS agenda into its work on poverty. The report titled *Education and HIV/AIDS* stated that 'A general basic education has an important preventive impact. It can equip children and youth to make healthy decisions concerning their own lives, bring about long-term healthy behaviors, and give people the opportunity for economic independence and hope' (World Bank, 2002b: xvii). The 2012 GMR endorsed this perspective, stating that 'Life skills education with a focus on HIV and AIDS encourages young people to adopt attitudes and behaviour that protect their health, for example by empowering them to negotiate sexual relations' (UNESCO, 2012: 5). These quotes sought to further frame education as empowerment by emphasising, via the critical issue of HIV/AIDS prevention, how learning could embolden people and communities to take control of their sexual health. At the same time, they

added to the counter-narrative challenging the stories neoliberal-leaning actors told about the health of nations.

4.2.2 Socialisation

This section explores the conflicting beliefs behind aspects of socialisation that further added to tensions in the aspirations for social progress. Although socialisation appeared to challenge economic prosperity as the most significant part of the vision, the social benefits of learning were often framed as qualities to be converted into economic gains led by powerful neoliberal-leaning beliefs about employability. Representations of schools as agents of socialisation and builders of social cohesion were prevalent in the British media as a liberal counter-balance to the centrality of the individual. Praising the education secretary David Blunkett's decision to include citizenship as part of the UK national curriculum in an article for *The Times Educational Supplement*, the Chief Rabbi of the United Hebrew Congregations of the Commonwealth Jonathan Sacks (1999) described schools as 'the matrix of freedom' and 'community-sustaining institutions'. Sacks (1999) added that 'They are the means by which one generation hands on its values to the next. They are also the crucial bridge between the family and society, where our horizons of sympathy are enlarged.' Writing for *The Guardian* the education researcher with the Institute of Public Policy Research, Martin Johnson (2004) agreed, noting that 'Schools carry out vital work in promulgating shared values, including tolerance of difference. All of this is vital work for society.' These quotes provide examples of the socialisation framing of education supported by small 'l' liberal beliefs about the collective perfectibility of individuals made possible by channelling values of social coherence to young people through education. Both echoed the words of the report *Learning: The Treasure Within* (commonly known as the Delors report) produced for UNESCO by the International Commission on Education in the Twenty-First Century. The most important voice here was the Commission's Chairman Jacques Delors (1996: 12) who stated 'While education is an ongoing process of improving knowledge and skills, it is also - perhaps primarily - an exceptional means of bringing about personal development and building relationships among

individuals, groups and nations.’ In this quote, Delors framed education as above purely economic interests which in a sense reflected his social liberal beliefs and political colours as a member of France’s *Parti Socialiste*. In the commentaries that followed this report, the notion of education as a social project was further legitimated. Drawing on the authority of the Delors report, the Assistant Director-General for Education at UNESCO Colin Power (1997: 188) made similar points, arguing that ‘Knowledge and minds are not commodities, not just “human resources” to be developed, exploited and then cast aside, but treasures to be cultivated to improve the quality of life of both individuals and societies.’ The main assumption here was that education constituted a social good of value for the individual qualities it fostered and the cohesion these attributes collectively generated in wider society. Framing learning as something greater than the lucrative pursuit for raised incomes, greater productivity and higher levels of growth further intensified the discursive assault on economic beliefs.

This perspective was supported by humanist-leaning actors who made clear their aspirations for international education as social progression. In a manner that echoed the egalitarian values of the Delors report, Tomaševski (2005a: 74) argued that ‘Education is not only, not even mainly, about the transmission of knowledge and skills. Education is a public good because it represents the most wide-spread form of institutionalized socialization of children.’ This quote placed emphasis on the social development of ‘children’ and it was in this sense that the persuasiveness of such humanist arguments were strengthened by invoking the UN Convention of the Rights to the Child (CRC). Residues of the Convention could also be traced to the views of UNICEF (2009: 4) when it spoke of ‘The right to develop one’s personality, talents and abilities to their fullest potential.’ These quotes sought to frame education as a social good by stressing that developing personal and social attributes in children was a right in itself, also that these qualities held intrinsic value and could not be considered as merely instrumental in enhancing economic growth. The following quote demonstrates another aspect of humanist thinking on socialisation. The law and human rights professor Fons Coomans (2007: 185) stated that ‘Education enables a person to make a contribution to society as an independent and

emancipated citizen,' adding that 'civil and political rights only obtain substance and meaning when a person is educated.' Coomans here displayed a commitment to combining elements of social progress with aspects of citizenship and political literacy to further strengthen humanist aspirations for education as socialisation within a rights perspective.

Tensions over social progression as a key aspiration in the liberal education model were observable from rival framings of socialisation in policy documents at both the national and global levels. Returning to the British context, in her foreword to the White Paper by the UK Department for Education and Skills (DfES) announcing citizenship as a mandatory part of the secondary school curriculum, the Education Secretary Estelle Moris argued in favour of 'An education that teaches us the joy of learning and gives us the qualifications for employment, that builds confidence and self-esteem and gives us the skills and values to meet the demands of a fast changing world' (DfES, 2001: 3). The OECD (2001: 17) followed a similar line to the UK government, stressing that 'well-rounded, flexible and adaptable individuals ready to continue learning throughout life are necessary for realising the economic goals of education.' These quotes sought to frame the social gains of education as marketable qualities and attributes consistent with the wider employability agenda. This resonates strongly when viewed from a perspective informed by education as an investment since aspirations for socialisation were ultimately directed towards the achievement of economic goals. Arguably it was this framing and its underlying neoliberal logic that kept social progress in the shadow of economic prosperity.

The following quotes demonstrate a supporting aspect of this framing that further legitimated the proposition that socialisation through learning served the economic good. Drawing on the authority of the famous High/Scope Perry Preschool study, the returns of fostering social skills and cooperation in underprivileged young children were presented in financial terms as dollar savings on the public legal system. The expert authority of early-childhood researcher Lawrence Schweinhart was employed by the OECD to argue that 'A return of USD 258 888 per participant over 40 years,

or one of USD 17.07 for each dollar invested, with 88% of that coming from savings on crime' (Schweinhart 2004 cited in OECD, 2007b: 86). The economist James Heckman's (2013: 2053) analysis of data from the same study followed a similar line, noting that 'The Perry program substantially improved externalizing behaviors (aggressive, antisocial, and rule-breaking behaviors), which, in turn, improved a number of labor market outcomes and health behaviors and reduced criminal activities.' These quotes sought to frame the social qualities of pre-school development as attributes that allowed for the saving of public funds thereby further entrenching the belief that education was an economic good. Casting these attributes as socioeconomic skills, the World Bank (2018: 96) took a similar line, noting that 'Grit, self-control, self-management, effective communication, and prosocial behavior can be central to not just economic outcomes but life outcomes more broadly.' The assumption was that personal and social attributes necessary for human relationships traditionally belonging to the social domain were now also to be regarded as high order non-cognitive workplace skills that were both transferrable across industries and essential to survival in the knowledge economy.

In subtle ways, the psychosocial objectives of education reinforced utilitarian beliefs that supported the commodification of socio-emotional attributes. This idea can be traced to the thinking of the sociologist James Nolan on the therapeutic ethic of the post-industrial era that placed 'the self' alongside aspects of confidence and self-esteem at the forefront of American sociology. Recognition of elements of the social being made the economic more acceptable: 'It offers to soften the harshness of life in the machine without removing the machine' (Nolan, 1998: 20). In the field of education, the inculcation of psychosocial attributes and morals could be traced back to the 'values classification' approach to learning promoted in Louis Rath's (1966) book *Values and Teaching*. In a push toward moral education, children were encouraged to choose their own values, display an appreciation of them and also act upon these values. These ideas re-emerged in the 1990s 'cloaked in a new terminology' (Nolan, 1998: 149) driven in the US by the education bills of the California state legislature which kickstarted a new movement in American education. The buzzword

was 'self-esteem'. Schooling that enabled emotional growth in children was framed as a vaccine against social ills such as addiction and welfare dependency that prevented gainful employment in adult life. This framing of education as a cure to social woes carried utilitarian beliefs that confident and emotionally mature individuals were prepared to perform in the modern workplace. With a focus on employment, this framing was sustained in the field of sociology by academics. In her book *The Managed Heart*, Arlie Hochschild explains how personal values are traded in the post-industrial job market, especially in the service-sector, through emotional labour. Learning to manage ones feelings added to this framing of personal values as employability skills: 'To manage private loves and hates is to participate in an intricate private emotional system. When elements of that system are taken into the marketplace and sold as human labor, they become stretched into standardized social forms' (Hochschild, 2012: 13). This reflects the way that emotions, traditionally reserved for private uses, became treated in a utilitarian way as feelings to be managed and put to commercial use. It also hints towards the flexible personality more suited to insecure work where labour needs to follow capital in a migratory labour economy.

To summarise, framings of the vision of international education as social progress though health and socialisation went some way towards challenging the primacy of economic prosperity as the most significant part of the vision. Despite indicating the further waning of faith in education as an investment, a major contradictory factor was that both aspects were swayed by the economising logic which drove the health of nations narrative and strengthened norms over personal attributes as employability skills. Whereas elements of social progress proved less controversial in challenging economic prosperity as the dominant aspiration in the discourse, more marginal aspects of human development perhaps stirred greater contention in this act

4.3 Scene III: Human Development

This scene explores the rival beliefs behind aspirations for education associated with a people-centred conception of development. Section one investigates economic representations that connected the discursive dots between human capabilities and the needs of the economy. The second section surveys counter-framings that narrowed the discursive gap between the rights-based approach to education and the set of values that supporters of human development held dear.

4.3.1 Empowering the Poor for Economic Success

Dominant voices in the discourse attempted to absorb confrontational elements of human development thinking by making concessions and thereby aligning its values with economic aspirations. Positioned against the background of popular campaigns to support international development during the period, the signs were that aspirations for education as an economic good had been softened by liberal notions of schooling as a moral crusade against poverty. Widespread public support for the 2005 Make Poverty History campaign in the UK points to an example of a cultural platform upon which popular consent was built up in the discourse for an ethical vision of schooling in poorer countries that never strayed far from beliefs about education as an economic good. Coinciding with the 31st G8 summit at Gleneagles which shared the campaign's priority of increasing foreign aid and cancelling debt, Make Poverty History received wide media coverage. Levels of exposure by the BBC even reached the point of controversy after a promotional video was featured in one episode of the BBC1 sitcom *The Vicar of Dibley*. Several years after the iconic Make Poverty History wristbands had been discarded, the commitments of the Gleneagles G8 summit continued to be recast in support of an economic vision of education shrouded in the language of human development. Reflecting on the summit in an article for *The Times* shortly before becoming Prime Minister, Gordon Brown noted:

In 1807 a combination of social compassion and moral outrage ended the British involvement in the slave trade. Today that same

compassion and outrage must inspire us to tackle the great wrongs of our time and to give every child in the world a better chance – freed from poverty and liberated by education. (Brown, 2007)

Brown here displayed a commitment to tackling the social injustices discussed at Gleneagles and made the case for education while re-igniting the spirit of Make Poverty History. Beneath the post-colonial undertones of Brown's words was a moral tale of liberal benevolence in overcoming poverty that served to powerfully legitimate thinking on education as an economic interest. Similarly, concessions concerning the moral and ethical dimensions of education's role in people-centred development were evident in the literature of donor agencies and elites attached to major institutions. Senior economist at the World Bank's Development Research Group, Varun Gauri (2003: 17) noted 'In the rights approach being treated with respect, which might entail a strong notion of equality of opportunity, is itself a development outcome as significant as material well-being.' DfID (2001: 8) similarly described education as 'a basic human right; a right which promotes other rights and responsibilities which contribute to economic and social development.' Setting out its policy, DfID (2001: 8) went on to note that 'Education empowers people to participate in the transformation of their lives and the societies in which they live. Without improved levels of education, sustained and broad-based economic growth will not take place.' Two analytical observations can be drawn from the above quotes: firstly, the presence of the human development values of empowerment and opportunity; and secondly, a framing of these values as instrumental in serving the greater economic interest.

The economist Amartya Sen was an important voice here, addressing issues of empowerment and popularising rights-based aspects of development which drew concessions. His influential book *Development as Freedom* promoted the idea of freedom as an end and means to development, arguing that economic prosperity could only be achieved in societies where citizens were free from oppression and enjoyed wide-ranging human freedoms. Sen (1999: 75) introduced the concept of 'functioning' to support his thesis that the aim of development should be to promote and widen the

freedoms that humans have to enjoy as a 'valuable being or doing'. The relevance of Sen's thinking with regards schooling grew out of the volumes of academic literature discussing the human capabilities approach as applied to education (see Unterhalter, 2013; and Robeyns, 2006). Institutional acceptance of this link was reflected in the 2002 GMR which employed similar language, stating that 'Education counts as a "valuable being or doing", as an "end" of development' (UNESCO, 2002: 32). This report clearly framed its aspirations for education around Sen's moral framework of human wellbeing and empowerment in the belief that education was an intrinsic part of human development. More broadly, Sen's work legitimated aspirations for education bound to a people-centred form of development in several ways. Firstly, his work carried the personal authority of a Nobel prize-winning economist and philosopher. Secondly, it used the theoretical rationalisation of the capabilities approach, a celebrated framework intended to weaken instrumental approaches that valued education insofar as it was a gainful human investment. Reflecting on the approach, the educationalist Pedro Flores-Crespo (2007: 48) noted that it 'Recaptures the humanistic view of education, which had been partially eclipsed by simplistic application of modernist theories of education.' Thirdly, when applied to learning Sen's theory crossed discursive streams with thinking on the right to education which emphasised the importance of schooling in improving the human condition. The human rights law scholar Fons Coomans (2007: 185) noted that 'Education is a social good, because it creates opportunities and provides people with choices. In this sense, education is an end in itself.' As will become clear in following section, this merging of human development and rights-based approaches generated powerful counterframings. In brief, these discursive elements had a legitimating effect that on the one hand made it difficult for rival actors to ignore, but on the other put the ideational wheels in motion to manage the emergence of this would-be educational norm.

The influence of Sen's approach was evident through a renewed poverty focus by the World Bank that projected a softer image and more benevolent identity whilst enabling it to preserve entrenched economic aspirations for education. Aspects of the capabilities approach were prominent in the report

Voices of the Poor, produced by the Bank's Poverty Group and led by the sociologist Deepa Narayan, which incorporated data from Participatory Poverty Assessments gathered through the Consultations with the Poor project. The report noted 'While there is a widespread thirst for literacy, schooling receives little mention or mixed reviews. Poor people realize education offers an escape from poverty — *if* the economic environment in the society at large and the quality of education improves' (Narayan *et al.*, 2000: 7). This quote shows the authors making the claim that empowering people to 'escape from poverty' was a priority for education in poorer countries but that this was contingent on other aspects of poverty with economic concerns never far from view. It reflects the wider focus of the report on the multidimensional nature of poverty and the management of assets with human investment regularly cited as a key aspect of empowerment. The report went on to note 'For those lacking material and productive assets, labor power is the core component of most survival strategies and therefore is perhaps the most important human capital asset' (Narayan *et al.*, 2000: 42). This quote resonates strongly with the notion of education as an economic good since the report displayed a commitment to human productivity as a major asset of the poor. A key purpose of undertaking this consultation with the poor was to inform the Bank's activities and lay the ground for the 2000/01 WDR focused on poverty. That report affirmed:

Poor people consistently emphasize the centrality of material opportunities. This means jobs, credit, roads, electricity, markets for their produce, and the schools, water, sanitation, and health services that underpin the health and skills essential for work. Overall economic growth is crucial for generating opportunity. (World Bank, 2000: 6-7)

The main analytical observation to be drawn from this quotation is that the Bank's focus on empowering the poor was indeed not a complete departure from its pro-market aspirations for education in generating 'economic growth'. The Bank's Senior Economist Varun Gauri (2003: 2) took a similar line here, claiming that 'rights advocates and economists are not far apart

in their approaches to education.’ This was illustrative of the means by which the Bank achieved a certain ambiguity by blurring the discursive boundaries between economic concerns and pressures to take a people-centred approach to tackling poverty through education.

Educationalists and development scholars voiced concern over what they perceived as a purposeful ambiguity which disguised a disregard for the human-centred aspects of international education. Challenging the World Bank’s Poverty Group and its strategy for tackling poverty, Francine Menashy (2012: 750) argued that it maintained a ‘purely economic conceptualisation of education’, before going on to highlight the ‘absence of a rights-based framework for education’. The educationists Karen Mundy and Antoni Verger (2015: 16) also had a sceptical take on how Deepa Narayan and other affiliates had ‘proved adept at marrying’ an agenda centred around the ‘core precepts of neoliberalism’, highlighting the ‘emergence of a global development consensus focused on poverty reduction and human development.’ In a paper commissioned by UNESCO, Joel Samoff and Bidemi Carrol (2003: 3) took this argument further describing the World Bank as ‘the DeathStar of Capitalism, imposing its control, supporting its friends, and destroying its enemies’. From these quotes we can see that critics sought to frame aspirations for human development and empowerment as distinct from economic interests by exposing what they perceived as a surreptitious obscuring of the two by elites.

4.3.2 Human Capabilities and the Right to Education

This section explores the ideational struggle to advance human rights framings of human development in a bid to discursively disentangle the notions of empowerment and capabilities from economic aspirations. Malala Yousafzai, the activist for the right to girl’s education and youngest ever Nobel Peace Prize laureate, emerged as an important voice highlighting the instrumental value of education in empowering individuals and communities to claim their rights. Malala’s recovery from a deadly attack by Taliban soldiers on her way to school in 2012 and subsequent rise as a global ambassador for the right to education made her a symbolic figure of

defiance. In her speech at the UN Youth Takeover in 2013, Malala (2013) asserted 'Let us empower ourselves with the weapon of knowledge.' Her words echoed those of Tomaševski (2001a: 9) who had previously stated that 'Education can be used to promote empowerment, but it can also be abused to justify repression.' In the media, Malala's UN speech was used to challenge the Pakistan government's abuses of the right to education. In an article for *The Independent* the education campaigner Kevin Watkins (2013) argued 'Perhaps the Pakistani government could take a leaf out of Malala's book and demonstrate the resolve and ambition needed to make education a right for all children in the country.' These quotes illustrate how knowledge was framed as a tool to empower and liberate the poor in a way that reflected rights-based framings of education as human development.

Stressing the intrinsic value of knowledge was key to the counterarguments that provided discursive resistance to powerful economic framings of human development. The educationalist Stephanie Allais argued:

The acquisition of bodies of knowledge is the basis for the integrity and intelligibility of education: this knowledge has its own internal justification separate from the economy and the short-term needs of society, and exists at the core of our common humanity. (Allais, 2014: 257)

What Allais seems to have been trying to convey was that education constituted an end in itself and that knowledge, forming part of our 'common humanity', was a central element of human existence. Humanist-leaning actors were similarly critical of attempts to distort the relationship between education and human development with economic concerns. The Special Rapporteur Kishore Singh argued that education was central to the notion of an 'intellectual commons' (UNHRC, 2013: 25). This perspective of knowledge as notionally detached from the commercial sphere was supported in the UNESCO report *Rethinking Education*:

The creation of knowledge, as well as its acquisition, validation and use, are common to all people as part of a collective societal

endeavour ... Knowledge is an inherent part of the common heritage of humanity. Given the need for sustainable development in an increasingly interdependent world, education and knowledge should, therefore, be considered global common goods. (UNESCO, 2015b: 11)

This report clearly employed a *topos* of humanitarianism with reference to knowledge as a 'common good' and as an element of our 'common heritage'. Here we can see language similar to that of academics who rejected economic notions inherent in broader descriptions of education as a public good. The report went on to quote the law scholar Maria Rosaria Marella who described common goods as 'goods that, irrespective of any public or private origin, are characterized by a binding destination and necessary for the realization of the fundamental rights of all people' (Marella 2012 cited in UNESCO, 2015b: 77). These comments resonate when viewed from a perspective informed by human asset logic in that they constantly challenged the proposition that education was an economic good and drew elements of human development closer to more established notions education as a human right.

If human development and the capabilities approach could be considered a more recent and malleable set of ideas, rights-based approaches perhaps provided a more established grounding to prise economic meanings from education. For humanist-leaning UN agencies and their affiliates, education was both end and means, as reflected in the gradual shift towards people-centred development over the decades leading up to the period of this study. The launch of the UN programme of reform in 1997 mainstreamed human rights laws into all of its development activities. For instance, the 2000 Human Development Report stated 'When human development and human rights advance together, they reinforce one another—expanding people's capabilities and protecting their rights and fundamental freedoms' (UNDP, 2000: 2). This discursive blending of capabilities and rights was applied to education by the UN Committee on Economic, Social and Cultural Rights (CESCR), as evident in the general comments added to article 13 of the

International Covenant on Economic, Social, and Cultural Rights (ICESCR) on the right to education:

Education is both a human right in itself and an indispensable means of realizing other human rights. As an empowerment right, education is the primary vehicle by which economically and socially marginalized adults and children can lift themselves out of poverty and obtain the means to participate fully in their communities. (CESCR, 1999)

From these quotes we can see that the combined egalitarian concerns with both capabilities and opportunities on the one hand and human rights on the other was foremost in the mind of the UN and its agencies. The impersonal authority of the covenant legitimated the views of staunch advocates of the right to education, including Tomaševski (2001b: 10) who noted 'Education operates as a multiplier, enhancing the enjoyment of all individual rights and freedoms where the right to education is effectively guaranteed.'

Arguably, this mainstreaming effect could be traced back further to accounts given by the World Declaration and Framework for Action adopted at the 1990 World Conference on EFA. Taking a historical view of the role UNICEF played in the conference and the shaping of the original EFA goals, Maggie Black (1996: 233-234) argued that the emphasis placed on all forms of learning was 'seen by UNICEF as recognition of the important developmental role of social mobilization, both as a means to achieve other development goals and as a knowledge-conferring end in itself.' Such discursive moments that sought to frame human development alongside rights-based approaches to education were performative, as can be seen from practical manifestations in the work of UN agencies. A key example was the child-friendly schools model through which UNICEF (2009: 2) proposed to 'move schools and education systems progressively towards quality standards, addressing all elements that influence the wellbeing and rights of the child as a learner and the main beneficiary of teaching, while improving other school functions in the process.' Here UNICEF displayed a

commitment to building capabilities by encouraging child participation in school management functions, and also to upholding the rights of children by taking a multi-dimensional approach to include aspects such as gender equality and nutrition.

In spite of these discursive attempts by humanist-leaning actors to weaken the grip that economic beliefs had over the meaning of human development, concessions were also made over the genuine potential for human rights in the wider context of global capitalism. Various holders of the Special Rapporteur role drew attention to this in their annual reports, as was reflected on in the following quotes from incumbents Vernor Muñoz Villalobos and Kishore Singh respectively:

Despite being an 'enabling right', the right to education has become a de facto derivative right; just as, for instance, the right to development, economic security and the right to life per se are subordinated to the primary rights of private property and the profit rate. (UNHRC, 2010: 18)

The humanistic mission of education is being vitiated. It is therefore important to pay critical attention to that phenomenon, so that education is inspired by a great humanistic vision rather than a merely utilitarian one that only considers education in terms of its material value. (UNHRC, 2013: 21)

These quotes framed the right to education as under siege by materialist norms and economic interests, using a *topos* of abuse to argue for measures to be taken to curb this perceived injustice. Here we can see language similar to that used by academics who took a critical perspective on the prospects for human rights given the challenges faced in protecting them. Drawing attention to these concerns, the international political economy scholar Tony Evans (2005: 10) argued 'The dominant conception of human rights reflects the central principles upon which the current global order is built, including ideas of economic growth and development, individualism, and free market economics.' The human rights academic Costas Douzinas

also had a sceptical take on the possibilities of rights-based approaches. He argued that the true meaning of human rights had been apprehended: 'Hijacked by governments that understood the benefits of a moral-sounding policy,' and 'ingrained in the new world order, their claims adopted, absorbed and reflexively insured against challenge,' adding that these distorted meanings 'imposed the ideology of the rich on the poor' (Douzinas, 2007: 33). The main assumption here was that the dominance of economic liberal thought altered rights-based approaches and re-cast them in the image of its own choosing. In the context of promoting aspirations for education in line with a people-centred conception of development that leant towards human rights, this reflected how humanist actors were compromised by the limitations of their own arguments.

To sum up, this scene has revealed how aspirations for education as human development were partially neutralised by powerful actors and institutions that absorbed the notions of capabilities and empowerment into their machinery and regurgitated it as rhetoric in support of education was an economic good. It also brought to the surface various counter-framings employed by rival voices to preserve and revitalise humanistic elements of human development and its associated aspirations for education. We have uncovered disputed meanings of human development in the vision, next let's turn our attention to intersubjective tensions that produced conflicting definitions of inclusion.

4.4 Scene IV: Inclusion

This scene explores the ideational drivers behind competing framings of inclusion, a slippery and ambiguous term that was used and abused by actors with conflicting educational and political beliefs. Section one investigates inclusion through the story of a morally bankrupt underclass that blamed the exclusion of children from education on the attitudes of irresponsible parents. Section two explores how inclusion was framed through a narrative that elites told about the importance of preparing young people for the workplace. A notable characteristic of this scene is the discursive relationship between domestic and international education policy on exclusion, which will become evident as we observe how ideas were discursively diffused across different scales of governance.

4.4.1 Parentocracy

Portrayals of exclusion from education in poorer countries tended to be focused on the role parents played in perpetuating family misfortunes. This was evident in the damning UK media coverage on the exclusion of girls from education in Sub-Saharan Africa. In an article for *The Evening Standard* highlighting non-inclusion of girls in Nigerian schools due to religious beliefs, Jeremy Bentham (2016) wrote: 'Efforts will also be made to convince Muslim parents that there is no religious justification for the widespread belief that girls should be married as young teenagers before they finish puberty.' Writing for *The Guardian*, Rafiath Rashid Mithila (2015) made similar points, arguing 'I've even heard stories about parents bribing teachers to declare their daughters dead so they don't have to return to school.' These quotes sought to frame the issue of girl-child social inclusion through education as a specific problem that arose from parental attitudes informed by African culture and psychology. The following quotes demonstrate another aspect this discourse in the media, namely the exclusion of the disabled from education due to African superstitions that stigmatised those with physical impairments. In an interview for *The Observer* the Education Programme Adviser for Sight Savers in Kenya Gladys Nyaga told Patrick McCurry that 'having a disabled child is seen as a curse on the family, so [parents] try to hide them away,' adding that 'other

families believe there is no point getting a blind or visually impaired child educated because they will find it hard to get work' (McCurry, 2002). In an article for *The Times* focusing on the handicapped in Africa, Ann McFerran (2005) took a similar view: 'Disabled children, it's often felt, don't need or merit being educated because they are something less than human. According to African tradition, disability is a curse, caused by terrible wrongdoing, a punishment from God for bad deeds.' From these quotes we can see that the traditional and cultural attitudes of parents and guardians were represented as culpable for the exclusion of disabled children from education.

These framings in the media were powerfully legitimated by arguments in the core policy documents of major aid donors that pointed to family failures when addressing issues of marginalisation in international education. USAID (2008: 8) warned of the need to 'Raise parents' awareness of their rights and responsibilities in education and of the importance of schooling for boys and girls.' This quote shows US development policy making the claim that education gains depended on the attitudes of parents. DfID (2016b) made similar points in its statement of action for the Girls Education Challenge, arguing that 'Where social challenges for marginalised girls are addressed, they transition smoothly through school and learn. We will work with children, families and communities to address restrictive social norms which are barriers to marginalised girls' education.'

Metaphors were a particularly powerful but discreet way of directing blame over educational shortcomings onto forms of social ignorance. Metaphors act as a heuristic device and when applied can develop and add clarity to the analysis, and in this case highlighted how elements of social exclusion were replaced in the discourse by symbolic language through metaphors of light and dark. For example, the World Bank and UNESCO combined Task Force on Higher Education and Society (2000: 19) noted that 'People live in poverty because they cannot reach the switch to turn on the light, and that switch is called education.' In his foreword to the 2003 GMR, the Director-General of UNESCO Koichiro Matsuura employed similar language, stating that 'Education is a torch which can help to guide and illuminate their lives'

(UNESCO, 2003b). The work of the linguist Jonathan Chateris-Black on the use of metaphors as rhetorical tools in political discourse brings clarity to this use of language. Chateris-Black (2005: 50) explains that 'Since knowledge is equated with light in this schema, darkness is by implication equated with ignorance.' Applying this explanation of light and dark metaphors to those presented in policy documents, what the above reports seem to have been trying to convey was that the children of families that failed or refused to harness the enlightening force of education would be destined to live in the shadows of ignorance.

Viewed from a broader public policy perspective, there were parallels between the parental failures framing in the international education discourse and the UK public policy on exclusion. Of relevance here was the dynamic that the sociologist Val Gillies (2012: 93) termed 'parentocracy', meaning a judgment of parental competence dependent on the how involved and committed they might be to their child's education. In the British context, parentocracy as a discursive and political practice was evident in the language of elite policy actors. In her article for *The Independent*, referencing an interview with the Secretary of Education and Employment David Blunkett on BBC's *Newsnight* in which he was defending New Labour's stricter anti-truancy regulations, Deborah Orr (1999) noted 'Blunkett revealed that he knew from neighbours who came to his surgery that some parents spent their evenings on drink and drugs and then slept until lunchtime, thus rendering themselves unable to get their children to school at all.' This quote provides a clear example of parental failure framing and indicates how a *topos* of responsibility was used to argue that disadvantaged parents were culpable for the educational failings of working-class children in the UK. Critical of this, academic actors took a dim view of how responsibility for the social and economic integration of young people had been shifted away from the welfare state and onto the individual. Dismissive of the New Labour government's harsh representation, the educationalists Charlotte Chadderton and Helen Colley (2012: 340) worried that 'Certain populations are rendered suspect, (re)produced as "human waste", have their full belonging as citizens denied, and are marginalised further and further.' Returning to the work of Val Gillies, there was concern

over the continuation of this parental failure framing in the social policy of the Conservative-led Coalition government and its perception of poor families as an obstacle to building towards the 'Big Society' ideal. As she put it 'Poverty and other social problems are directly attributed to family failings and are portrayed as a wider social malaise typifying sections of what Conservatives have termed "Broken Britain"' (Gillies, 2012: 93). It is highly probable that these critical academic commentaries owed a debt of gratitude to the work of the sociologist Ruth Levitas (2005: 2) which focused on the discourse of the 'moral underclass' in issues of social inclusion. She described this discourse as having two characteristics: 'It represents the underclass or socially excluded as culturally distinct from the mainstream,' and secondly 'It focuses on the behavior of the poor rather than the structure of the whole society' (Levitas, 2005: 21). The assumption here was that a neoliberal norm was in force that diverted responsibility for socio-economic disadvantage away from the state and political elites and on to the underprivileged through a widely accepted narrative of self-induced personal failures.

Further inter-subjective tensions in the discourse came to light when considering humanist perspectives on the role of parents and families in achieving rights-based aspirations for education. Supporters of the right to education tended to attribute blame for development shortcomings to broader social and cultural challenges beyond the control of the poor. Addressing the injustices of excluded girls from school, the Special Rapporteur Vernor Muñoz Villalobos argued 'Patriarchal beliefs and behaviour encompassed in the concepts and models of the old industrial societies has had a dramatic impact on modern schools, validating and reproducing stereotypes, prejudices and inequalities generation after generation' (UNCHR, 2006: 5). Here we can observe a framing of girl-child exclusion from education in socio-cultural terms as informed by the tradition of patriarchy. In this rights-based perspective on inclusion, parents and families of children were cast in the role of duty-bearers. One example was the way in which UNICEF (2003: 10) asserted that families were among 'those responsible for seeing the right to an education fulfilled'. The UN CRC

was a document of much importance in adding weight to this argument. Article 29 argued for:

The development of respect for the child's parents, his or her own cultural identity, language and values, for the national values of the country in which the child is living, the country from which he or she may originate, and for civilizations different from his or her own. (Convention on the rights of the child, 1989: 9)

This quote illustrates the extent to which codified right-based norms contradicted the dominant framing driven by notions of family failings and a moral underclass. Considering parents and caregivers as duty-bearers conferred a level of dignity and respect on the families of disadvantaged children. The residues of this counter-framing could be picked up in the 2010 GMR which argued 'Marginalization in education is a form of acute and persistent disadvantage rooted in underlying social inequalities' (UNESCO, 2010: 135). This extract resonates strongly with the notion of education as a social good in that it shows UNESCO distancing itself from the discursive tactic of blaming the poor for failing to seize educational opportunities to improve their material circumstances. But as will become clear in the following section, framings that pointed the finger at the attitudes and behaviours of families in connection with shortfalls in their children's education tended to complement framings of inclusion as work readiness.

4.4.2 Work Readiness

If failing families were such because individuals didn't possess the skills or knowledge to integrate socially and economically, education was the means to instil the necessary qualities and abilities to prepare them for the labour force and break the chains of intergenerational poverty. This was the dominant framing of inclusion as work readiness that prevailed during the period of study, the discursive origins of which could be traced to the social policy of the UK New Labour government. Shortly after Blair took office in 1997, the Social Exclusion Unit was set up and located within the Prime Minister's office. Central to the Unit's thinking was the notion that if social exclusion was an outcome of poverty, then inclusion was a way of

preventing poverty from occurring in the first place. In an article for *The Independent* announcing the launch of this Unit, Blair (1997) affirmed that 'Poor education means a poor job. A poor job often leads to poor housing. Poor housing and poor jobs make it harder to bring up a family.' The focus on tackling social exclusion coincided with benefits cuts, linked up policy areas such as the New Deal (based on the welfare to work model) and training schemes aimed at those not in education, employment or training. New Labour innovation on social exclusion had a strong bearing on its national education policy. The White Paper titled *Schools: achieving success* concluded that 'Every child, whatever their circumstances, requires an education that equips them for work and prepares them to succeed in the wider economy and in society' (DfES, 2001: 5). This quote resonated strongly with the economic investment logic through its liberal commitment to schooling as preparation for the workplace and a life of employment that would economically integrate individuals thereby achieving a more level playing field.

Turning our attention to the global policy context, the World Bank followed a similar line to the UK government in its inclusion strategy for young people in poorer countries. The 2007 WDR noted:

Once young people are in the labor market, they begin to reap the benefits of earlier investment in education and health, and continue to develop the skills needed for a productive livelihood. A successful transition to work for today's many young people can accelerate poverty reduction through better allocation of their labor, and boost economic growth. (World Bank, 2007: 96)

This quote sought to frame education as readiness to work in line with the Bank's aspirations for schooling to tackle social exclusion. It resonates when viewed from a perspective informed by education as an economic good in that people's ability to translate knowledge into a 'productive livelihood' is what prevents them from becoming social outcasts. The World Bank's expert authority in poverty matters added to the legitimization of this framing and this influence was apparent in the 2012 GMR which stated:

Young people who have grown up in poverty and exclusion are more likely to have had little education or to have dropped out of school. As a result, they have fewer opportunities to develop skills for decent jobs and hence risk further marginalization in the labour market. (UNESCO, 2012: 13-14)

Here we can see language similar to that of the Bank, with emphasis firmly placed on the inculcation of skills and knowledge that would allow the disadvantaged youths to mitigate against 'marginalization' and work their way out of poverty. Another notable point is that in the context of low-income countries, inclusion concerns tended to be more noticeably gendered in the discourse. The World Bank was again an important voice here, addressing issues of how markets and services were central to breaking down barriers to women's social inclusion. For instance, achieving greater social inclusion of women would entail developing markets by 'Ensuring access to the labor market and better terms of employment' (World Bank, 2013: 121). The Bank (2013: 121) also affirmed that a further entailment would involve expanding services to develop the 'marketable skills' of poorer women. The main analytical observation to be drawn from these quotations is that through its inclusion strategy the Bank doubled-down on its beliefs that education was an economic resource. Later in this section it will become more apparent how gender elements of inclusion feature in the arguments against work readiness, but before clarifying that point let's examine the broader counter-framing.

A source of further tension in the aspirations for education as form of inclusion was the critical perspective taken by academic actors on the dominant work readiness framing and associated argumentation deployed around the theme of social justice. Ruth Levitas was once again an important voice once again here, addressing issues of how the social integration narrative of New Labour evaded wider socio-economic imbalances in British society. Levitas argued:

A discourse about social exclusion which focuses on integration through paid work tends to reduce the social to the economic, and simultaneously limits understanding of economic activity to market activity. If inclusion tends to shift the agenda away from inequality, the focus on inclusion through paid work exacerbates this. (Levitas, 2005: 26)

The assumption here was that the New Labour framing of social integration through work discursively masked political efforts to engineer a market-friendly departure from an earlier redistributive discourse committed to tackling poverty through welfare. By implication, representing social inclusion as 'integration through paid work' meant that education systems were to play a supporting role in increasing 'market activity' by building a skilled labour force. The adult educationists Hellen Colley and Phil Hodgkinson also had a sceptical take on the assertions of New Labour's Social Exclusion Unit, and in particular the ways in which the socially included were presented as a homogenous group. They argued that, 'In making such a generalisation, the vast inequalities that exist within the paid workforce are swept under the carpet' (Colley and Hodgkinson, 2001: 347). This quote supports Levitas' claim that the inclusion through paid work narrative served to deepen social inequality, for example through the poor being forced to take low-paid jobs with unsociable hours and the consequent social strain this placed on disadvantaged families. Similar concerns were also expressed by development studies scholars suspicious of how the term 'inclusion' was being applied in poorer countries. Critical of inclusion as a development buzzword, the development academic Guy Standing (2010: 53) argued that it 'envisages a shrinking role for the state, moving away from provision of a comprehensive relatively universalistic system of social support and from a wide range of enterprise benefits unrelated to the performance of labour.' What Standing seems to have been trying to convey was that the dominant framing of inclusion as gainful employment was part of a wider neoliberal shift from a welfare to a workfare system. Furthermore, and reflective of the role education had to play, that this trend was sympathetic to microeconomic perspectives consistent with beliefs in schooling as an investment that integrated skilled individuals into the fabric

of a prosperous society characterised by increased productivity and higher incomes.

Building on these counter-arguments, associated concerns highlighting gender imbalances were influential in further unsettling the dominant work-readiness framing. The context of this rupture in the integrationist logic was the historically embedded consciousness of women as an undervalued and exploited source of labour. An example of this tension was observable in earlier feminist accounts of development, such as that put across in an article for *The Guardian* by Jane Beasley (1984) who argued that 'Women produce two-thirds of the world's food; yet they own a tiny fraction of the world's wealth - and comprise two-thirds of the world's illiterate population.' This concern over unequal wages and status of working women in low-income countries grew in authority through the support of fellow activists, including the feminist and development consultant Esuantsiwa Jane Goldsmith. It was against this backdrop that the dominant discourse supporting social integration of women through work was challenged by employing a rhetoric of abuse. Critical of the implications of this powerful framing, Ruth Levitas (2005: 27) argued that 'It is unable to address adequately the question of unpaid work in society,' adding that 'because it ignores unpaid work and its gendered distribution, it implies an increase in women's total workload.' From this quote we can see that the issue of domestic (or, hidden) labour was foremost in the mind of Levitas and her redistributionist counter-framing.

Actors affiliated with international organisations and pressure groups were similarly critical of what the integrationist framing meant for underprivileged women. For example, acting as a consultant to the International Labour Organisation, the economist Rania Antonopoulos (2009: 2) argued that 'Unpaid care work entails a systemic transfer of hidden subsidies to the rest of the economy that go unrecognized, imposing a systematic time-tax on women throughout their life cycle.' The Head of Inequality Policy and Campaigns at Oxfam Emma Seery (2014: 12) made similar points, arguing that 'Women and girls work between two and five hours more than men every day as part of the unpaid "care economy".' These quotes sought to

frame social inclusion through work as discriminatory against women by exposing the 'care work' that went unrecognised and unrewarded in the 'care economy'. The upshot of this for international education was that domestic labour within the family was a major obstacle to keeping girls from poorer families in school. Describing this forcefully, the 2003 GMR noted:

Children's need to work is one of the main reasons they do not go to school. Parents are the main employers of children, a fact not necessarily reflected in statistics that omit those engaged in domestic chores, many of whom are girls. (UNESCO, 2003b: 18)

This quote resonates strongly when viewed from a perspective informed by beliefs about the economic utility of education. It exposes a contradiction in that while education was supposed to have been providing girls with the knowledge and skills to integrate socially through paid work, at the same time domestic labour was acting as a force which further marginalised girls by keeping them out of school.

In summarising this scene, discursive disputes over the aspirations actors had for education to tackle social marginalisation was another source of conflict in the vision. We have seen how the dominant framing that portrayed educational shortcomings as a consequence of the ignorance and regressive attitudes of parents went against humanist thinking that perceived parents as holding the status of duty-bearers with obligations to ensure the enjoyment and fulfilment of the right to education for their children. Further tensions were observable in the discursive struggle between the controlling integrationist representation that valued education insofar as it socially integrated individuals by preparing them for work and a redistributionist counter-framing. The analysis revealed how this dominant framing, driven by the underlying belief in education as an economic good, was challenged by powerful social arguments critical of reductions in state welfare support and the hidden (unpaid) domestic labour of girls and women. Having explored issues of inclusion, the vision act concludes by investigating aspirations for education as a means of achieving security.

4.5 Scene V: National Security

The final scene of this act explores the beliefs behind aspirations held for education to promote national security. This scene was a site of ideational tension between those who considered economic forces to be among the main cause of violence and others for whom psychosocial factors were key drivers. In the first section, framings of education as a means of conditioning the human mind for peace are explored, focusing on the discursive influence psychologists had on UN agencies and NGOs doing post-conflict relief work in low income countries. Section two explores how psychosocial framings of education as peace were challenged by the emergence of the powerful 'conflict trap' norm that bounded education and conflict prevention issues up with economic interests.

4.5.1 Education, Peace and the Psychosocial Framing

The global 'war on terror' was a key contemporary context within which national security grew in importance as a major aspiration for actors involved in international education. This context returns us to the speech given at the UN Youth Takeover by Malala:

When we were in Swat, the north of Pakistan, we realised the importance of pens and books when we saw the guns. The wise saying, 'The pen is mightier than sword' was true. The extremists are afraid of books and pens. The power of education frightens them. (Yousafzai, 2013)

This quote shows Malala making the claim that education took the unlikely form of a counter-terrorism measure, aided in this case by a reference to the well-versed metonym from Edward Bulwer Lytton's *Richelieu* to further rationalise her argument. Months before the Taliban's attempt to assassinate Malala, this framing of education as weapon against extremism was also observable in the 2011 GMR on conflict and education. In her foreword, the Director-General of UNESCO Irina Bokova stated:

No defences are more secure than public attitudes grounded in tolerance, mutual respect and commitment to dialogue. These attitudes should be actively cultivated every day in every classroom across the world. Using schools to vehicle bigotry, chauvinism and disrespect for other people is not just a route to bad education but also a pathway to violence. (UNESCO, 2011: ii)

This extract shows Bokova advocating education as a means to protect individuals from extremist views. Here we can see similar language to that used in the Constitution of UNESCO which promoted peace in the minds of men. The constitution noted 'Since wars begin in the minds of men, it is in the minds of men that the defences of peace must be constructed' (Constitution of UNESCO, 1945). In his report for the preparatory commission written whilst awaiting ratification of the constitution, the British biologist Julian Huxley (1946: 7) endorsed this perspective, stating that '[UNESCO's] main concern is with peace and security and with human welfare, in so far as they can be subserved by the educational and scientific and cultural relations of the peoples of the world.' Here Huxley displayed a firm commitment to putting security concerns at the forefront of the UNESCO philosophy. There are clear examples of a psycho-social framing of peace here which implied a major role for education in support of UNESCO's commitment to national security.

The very notion that learning could be a force for peace was clearly present in UNESCO's understanding of race relations going back to the 1950s. Race and conflict were inseparable in the historical context of the post-WWII period during which widespread reflection on the persecution of the Jewish race coincided with the start of the direct-action phase of the American civil rights movement. UNESCO was an important voice here, addressing issues of race in the document *Four Statements on the Race Question*. Several key arguments evolved through these statements. The first statement argued 'It is now generally recognized that intelligence tests do not in themselves enable us to differentiate safely between what is due to innate capacity and what is the result of environmental influences, training and education' (UNESCO, 1969: 32). This was a clear challenge to currents of biological

racism that still plagued society, and which arguably continue to in the present day. The following quote from the fourth statement demonstrated the importance of schooling: 'Education and other means of social and economic advancement, mass media, and law can be immediately and effectively mobilized for the elimination of racial prejudice' (UNESCO, 1969: 53). This statement went on to describe education as one of the 'agencies of enlightenment' (UNESCO, 1969: 53). These quotes show UNESCO further representing education as a crucial means of eliminating racially-motivated conflict by tackling the false beliefs about race that fuelled violence and hatred. These discursively embedded beliefs in UNESCO's race statements echoed those of influential academics in the fields of social psychology and anthropology.

Psychosocial framings of peace were shaped by the influence psychologists had on US foreign policy during the 1960s at the time when the so-called 'third world' countries were experiencing rapid decolonisation. Ellen Herman's detailed account of this moment in history provides a window into the psychological foundations of development efforts and increased faith in the claims of American psychologists who identified personality and the national character as important factors in the peaceful transition of newly-independent states. Psychological approaches took priority over what were considered to be inadequate explanations by economists:

Mothers, because they functioned as personality factories, became favorite subjects of expert attention and logical objects of public policy. The inner landscape, that familiar geography on which so much military conflict transpired, also turned out to be the key to unlocking peaceful economic change in far-flung corners of the world. (Herman, 1995: 137)

This quote shows Herman making the claim that character development through family childrearing practices, or maternal 'personality factories', could be the ultimate key to ensuring a secure and non-violent route in transitioning to a strong and independent state. In her account, Herman (1995: 145) also observed the political scientist Lucian Pye's focus on wider

institutional sites of learning, stating that 'Modernizing the political structures of Third World states would require the inculcation of new forms of identity through a revamped socialization process.' The assumption here was that schools, viewed as places where young people became socialised, would act as institutions to develop the personalities of citizens on an industrial scale and in such a manner that the building of secure states with strong levels of political organisation could proceed without uprising and bloodshed. This focus on nurturing the national character resonated strongly with the proposition that education constituted a social good and supported the above-mentioned arguments over social progress that advanced the notion of schooling as chiefly concerned with socialisation rather than wealth creation.

The ideational influence of American psychologists could be detected in the later work of UN agencies and development charities focused on conflict prevention and post-conflict reconstruction. Beginning with prevention, one clear example was *The Seville Statement on Violence* endorsed by UNESCO and adopted in 1989. This Statement dispelled the myth previously used to justify wars: that human conflict was somehow biologically determined. In his opening commentary to the Statement, the psychologist David Adams (1991: 7) affirmed that 'There is nothing in our biology which is an unsurmountable obstacle to the abolition of war and other institutional violence,' adding that 'war is a social invention, and that peace can be invented to replace it.' If war and peace could, as Adams claimed, be controlled by human thought then education was of course necessary to channel non-violent cognition. Adams (1991: 11) went on to note that 'since the brain has a great capacity for learning, it is possible for us to invent new ways of doing things'. These extracts from the statement show Adams advocating the notion that the human brain could be trained and conditioned towards peace thus underscoring the classic UN claim that peace did indeed reside in the minds of individuals.

Turning our attention to the influence of psychology in post-conflict settings, Save the Children was an important voice here, addressing issues around the psycho-social wellbeing of children affected by war. In its report

investigating the well-being of children affected by conflict, the charity stated:

Psychosocial well-being and competence to satisfy material needs are inter-related. People in war-torn societies [...] need their earning ability. Vocational and skills training for young people not only helps to augment income-earning ability and economic independence, it also serves to increase a feeling of identity and self-worth that enhances psychological healing. (Save the Children, 1996: 6)

This report framed education and training as an important aspect of the 'psychological healing' process for those mentally and emotionally scarred by war in a manner that balanced concerns for 'self-worth' and other aspects of wellbeing alongside immediate 'material' needs. Further evidence of this psychosocial healing framing of education could be found in the later work of various UN agencies. For example, as a guidance note to UN country teams working on the Girls' Education Initiative noted 'In the aftermath of humanitarian disasters, getting schooling going is one of the principal elements of healing and accelerating the return of society to normalcy' (UNDP, 2002: 4). This perspective was supported by the UNICEF No Lost Generation Initiative intended to safeguard the future of children caught up in the Syrian civil war. UNICEF (2014: 1) argued for 'Assistance to protect them from violence, abuse, and exploitation, education to foster their minds and their resilience, and support to heal the hidden wounds of a merciless war and strengthen social cohesion.' These comments resonate when viewed from a perspective informed by social liberalism in that beliefs about education as an investment were seemingly less important than the psychosocial challenges of rebuilding dignity and self-esteem in communities ravaged by war.

4.5.2 Learning, Prosperity and the Conflict Trap

There were observable tensions over aspirations for realising national security through education in the discourse as the historically embedded psychosocial framing was undermined by counterarguments that placed emphasis on economic prosperity and material well-being. The belief that

investment in education could prevent social unrest by improving living standards in poorer settings was evident in the media and supported in the stories told about civil uprisings in popular culture. Reporting on the launch of the World Bank's Human Capital Index for *The Telegraph*, Laurence Dodds (2018) noted 'Behind these rankings, however, is a dark vision of how automation and malnutrition could create a global underclass and provoke unrest on par with the Arab Spring.' From this quote we can see that security concerns were foremost in the mind of the Dodd's thinking on shortfalls in human investment. The article went on to draw similarities with the society depicted in the HG Wells novel *The Time Machine* by arguing that a poorly-educated and disgruntled class of have-nots could result in the 'division of humanity into two subspecies' (Dodds, 2018). This was a reference to how, in Wells' dystopian future, humans had evolved into two distinct species: a subterranean, cannibalistic and barbaric underclass of workers known as the Morlocks; and the Eloi, a civilised and leisurely class that are served and clothed by the repressed Morlocks. In Wells' (2012: 64) narrative, an uprising took place in which the 'miserable and rebellious' rose to the earth's surface and ascended to power, overrunning the planet and dominating the Eloi. In making this analogy, the assumption here was that by investing in the skills and knowledge of the population at large, low-income countries could avoid such social unrest and improve their prospects for national stability.

Tracing these claims back through the documents, beliefs over economic prosperity as an effective means of conflict prevention appear to have strengthened in the 1990s via the support of development economists. During his time as Director of the Development Research Group at the World Bank, Paul Collier was the most important voice legitimating the notion that economic factors were the most significant motivation for violent conflict. The first discursive step was to delegitimise the argument that race and ethnicity were the key causes of conflict. Collier and fellow economist Anke Hoeffler (1998: 571) argued 'Ethnic division is the most common political explanation for civil war,' adding that 'while ethno-linguistic fractionalisation is significant, more fractionalised societies are not more prone to civil war.' Collier (2007: 24) further endorsed this perspective, asserting that 'Looking

through history, about the worst case of ethnic discrimination I can think of occurred after the Norman invasion of England.' This dismissal of ethnic tensions permitted Collier to then advance his preferred rhetoric of the economic causes of conflict and key to the emergence of this norm was Collier's powerful conceptualisation of the 'conflict trap'. According to Collier, the conflict trap was perpetuated by two economic factors. The first pointed to insufficient wages as a cause of conflict: 'Low income means poverty, and low growth means hopelessness. Young men, who are the recruits for rebel armies, come pretty cheap in an environment of hopeless poverty' (Collier, 2007: 20). The second economic factor concerned the undiversified base of commodities often found in low income countries: 'at the risk maximizing value of the primary commodity export share (0.26), the risk of civil war is about 23 percent' (Collier and Hoeffler, 2000: 23-24). These quotes show Collier supporting his claim that the root causes of civil war were economic with low wages and over-reliance on primary commodity exports, diamonds and sugar for instance, as key factors. This economic thinking behind the conflict trap laid the foundation for claims over how these pitfalls could be avoided through schooling. Collier and Hoeffler (2000: 23) noted that 'If the male secondary school enrollment rate is 10 percentage points higher than the average, the risk of war is reduced by about four percentage points.' This study clearly framed education as an economic tool for achieving peace. The quote itself resonates strongly with rates of return logic by calculating a cost-benefit trade-off in which the potential lost income of individuals is weighed against the gains of taking up arms.

It is highly probable that the economising logic inherent in Collier's work was performative in shaping the national security aspirations that international organisations and major donors held for education. In their guide to conflict prevention in poorer countries for the EU's Conflict Prevention Network, the policy consultants Michael Lund and Andreas Mehler (1999: 9) noted 'Lack of jobs and educational opportunities opposes the younger generation's expectations for social advancement.' Supporting work readiness and skills training in fragile states, the USAID (2005: 11) Education Strategy took a similar line: 'Such direct support is appropriate

in selected circumstances, particularly in fragile states recovering from crisis and conflict, where the presence of large numbers of unskilled ex-combatants undermine the country's newly regained stability.' These quotes supported the economic framing of education as a harbinger of peace. The World Bank's first official report on education and post-conflict reconstruction echoed the beliefs of Collier:

Where dependence on primary commodity exports is reduced to less than 10 percent of GDP, the risk of conflict falls to 10 percent. Economic diversification requires the development of new and flexible skills and competences that require a functioning and efficient education system. (World Bank, 2005: 9)

This report clearly employed an economic framing of education as national security with reference to the 'primary commodity' factor of Collier's conflict trap and highlighted the role of education in diversifying national production. The power of this framing was such that organisations more typically disposed to psychosocial thinking on education and security were compromised. For example, the 2011 GMR on education and conflict noted 'To the extent that the education system creates opportunities for employment, it can diminish the incentive for young people to join armed groups' (UNESCO, 2011: 161). A report on the origins of peace by Save the Children (2008: 7) too stated that 'Education is viewed as a way of tackling poverty, which had been identified as a root cause of the conflict.' These quotes show both organisations making concessions in response to the powerful notion that higher incomes and standards of living derived from education were necessary to prevent war and escape cycles of conflict.

Discursive resistance to the emergent norm of schooling as an economic means to avoid the conflict trap was led by a resurrection of ethnic thinking that accentuated the potential for education to perpetuate violence. This occurred against the historical backdrop of civil wars in the 1990s characterised by ethnic cleansing including the conflict in the former-Yugoslavia and the Rwandan genocide. Highlighting this key contradiction in their report for UNICEF, the security and human rights researchers

Kenneth Bush and Diana Saltarelli (2000: 9) noted 'Education has exacerbated intergroup hostility under conditions of ethnic tension.' This quote shows Bush and Saltarelli supporting the claim that education possessed both a negative as well as a positive face in the context of security concerns. Here we can see language similar to that of the Statement on Race issued by UNESCO (1969: 53) which argued 'The school and other instruments for social and economic progress [...] can equally much be used for the perpetuation of discrimination and inequality.' The notion of the negative face of education could be traced to subsequent studies into education, conflict and development. It had a particularly strong influence on the work of DfID as concerns over Islamic extremism rose up its post-9/11 agenda. Articulating its strategies for achieving international development targets, DfID (2001: 17) stated 'Education may actually contribute to conflict through language policies which discriminate against minorities or through a curriculum which prejudices their standing in society.' In a report commissioned by DfID, the educationalist Alan Smith and Director of the NGO Humanitarian Initiatives Tony Vaux made similar points, with reference to 'The use of education as a weapon in cultural repression of minorities, denying them access to education, or using education to suppress their language, traditions, art forms, religious practices and cultural values' (Smith and Vaux, 2003: 18). The World Bank (2005: 9) echoed these comments, stating that 'Education systems and schools, which tend to reproduce the skills, values, attitudes, and social relations of dominant groups in society, are frequently a contributory factor in conflict.' These comments resonate when considered from a viewpoint informed by notions of education as a social good. This is because proponents of this perspective acknowledge the significance of ethnicity in the debate together with the powerful role learning plays in shaping human behaviour which either stabilises or disrupts peace.

To summarise, this scene has revealed that the aspirations actors held for the education in heralding national security were a site of intense discursive struggle. It demonstrated how a powerful norm, influenced by psychologists, developed out of historical framings that represented education as a means of developing peace in people's minds. However, the unrelenting faith

economists placed in skills investment was the ideational driver behind a counter-framing that cast education as essential for escaping the conflict trap of low incomes and limited commodity exports. It was through the rejuvenation of concerns over ethnicity from the UNESCO statements on racial discrimination that the linkages between education and conflict were once more discursively disentangled from economic arguments.

4.6 Act Summary

This act explored the aspirations actors had for international education by presenting an analysis of the rival beliefs behind these ambitions. The analysis revealed how these conflicted aspirations comprised the vision, forming the first act chronicling how the liberal model of international education was discursively constructed as a grand narrative. In distinguishing the genre of this narrative, the vision constitutes the opening act of a wider story mapped out as a *quest* in which a diverse party of actors reflected on the mission ahead of them and articulated their desires of what they hoped could be achieved through better education in poorer countries. The five interlocking scenes of this overarching vision were elicited from the lower-tier theoretical context centred around a binary debate over whether education constituted an economic or a social good. Economic prosperity proved to be the most significant part of the vision of education, perceived as a means to guarantee the wealth of individuals and nations. That said, the other parts of the vision revealed by this binary debate exposed how the potency of economic investment logic, although dominant in thinking over ambitions for international education during the period of study, was gradually eroded over the course of this opening act. For the analysis has unveiled how beliefs behind arguments in favour of people and community-centred dimensions of schooling gave prominence to aspects of social progress and human development in the vision act.

As the vision has demonstrated, the aspirations actors had for international education were a source of major dispute. The goals that elites and institutions formulated and hoped to achieve were compromised by tensions because they were informed by underlying values belonging to distinctly different schools of thought. It was these contested positions that shaped individual narratives, decisions and subsequently the diverse policy plans of rival actors. Struggles and clashes in the discourse were ultimately driven by disagreements over economic aspects of the liberal model as actors endeavoured to define the purpose of education in the promotion of international development. A clear example of these tensions was the ideational struggle to advance human rights framings of human

development in a bid to discursively disentangle notions of empowerment and capabilities from economic aspirations. Another instance concerned the manner in which people-centred framings of socialisation seemed to loosen the authority of economic prosperity as the most important component of the vision.

Even at this early stage of the overall narrative some initial indications of discursive shifts began to emerge. Perhaps the most noticeable shift was the gradual abating of the knowledge and skills investment logic rooted in economic liberalism as the dominant explanatory model guiding aspirations for international education. The arguments of actors holding beliefs aligned with humanism, Marxism and contemporary social liberalism in the discourse were performative in that they incrementally diminished the dominant norm around education as a financial project to increase the wage-earning potential of human assets and the wealth of nations. Another observable shift in the discourse highlighted the growing prominence of the knowledge economy as a powerful discursive imaginary that loomed large in the economic context of the vision. In this act, modern skills and knowledge were portrayed as lucrative resources that enabled trained and inculcated individuals to play productive roles and thrive in the post-industrial economy. Having identified the narrative, tensions and discursive movements in the vision, we turn to the next act of the story to discover how these aspirations for international education were operationalised.

Act II: The Administrative System Governing the Liberal Model of International Education: The Process

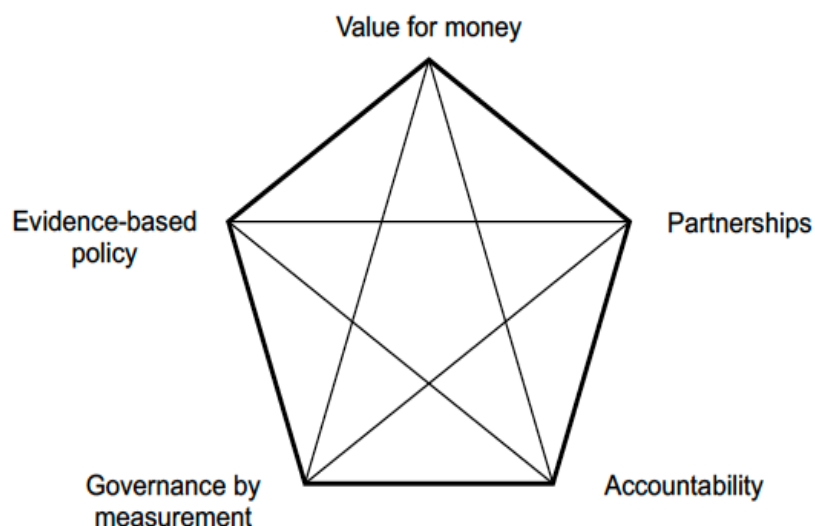
The previous chapter explored the aspirations actors had for education, arguing that the vision formed the first act chronicling how the liberal education model was discursively constructed as a grand narrative. This act continues the story to investigate how the vision was put into practice by exploring the most significant parts of the process driving the administration of international education. It addresses the second research question: *How did actors discursively construct the administrative system governing international education?*

The process speaks to theoretical concerns over governance mechanisms associated with economic liberalism and argues that the system governing global education was discursively constructed according to five scenes. Figure 8 illustrates these scenes in a pentagram. Informing these scenes was a lower-level theoretical dispute over the extent to which marketisation, a preferred governance strategy in the liberal capitalist model, was the key dynamic driving the process. This secondary tier of theory served the analysis in two ways. First, it directed the coding of topics and elicited keywords in the coding scheme (presented in appendix 4). Second, it steered the analysis through a binary debate over whether marketisation, the pole aligned with economic liberalism which valued results and performance, or humanisation, the critical pole with its appreciation of equity and measures to ensure progress towards achieving the right to education, was the driving force in each scene and indeed the process act overall.

This discursive construction of the process reveals how the system governing the liberal education model, often presented as functional and

harmonious, was a site of greater conflict, tension and contradiction than had been commonly perceived. It also better equips us to begin thinking about the necessary steps towards resolution. These embedded frictions derive from the divergent beliefs of actors influenced by their competing ideological tendencies. Appendix 5 presents the ideological leanings of the actors and institutions that shaped the process. Notwithstanding these strains, the analysis remains empathetic to the notion that no system is fool-proof and that any model of governance, liberal or otherwise, would similarly suffer from internal tension and be subject to external criticism from competing schools of thought.

Figure 8. The process



This act begins by surveying three conflicted scenes at the heart of the process that were instrumental in the drive for results and performance. Value for money was the most significant part of the process because governments, their development agencies and institutions placed utmost importance on 'doing more with less'. A dominant consultancy-styled model of cost-effectiveness proved too formidable for a rival approach to public spending that prioritised the deployment of maximum resources available to the state. Scene two explores partnerships as the second-most part of the process. Policy entrepreneurs and donors driven by their belief in market forces promoted private provision as a means of driving up efficiency and

equity. The efforts of critics, who saw this as a neoliberal re-branding of privatisation, struggled to weaken this dominant framing. The third scene explores accountability, another core part of the process. Accountability proved important because responsibility was placed firmly on the heads of functionaries who pulled the levers of international education policy and were answerable for successes and failures. Another significance of this scene was the relative strength of counter-framings that sought to highlight contradictions buried in the results-driven process. Throughout these core scenes we will observe a convergence in the beliefs of major donor nations, their development agencies, international bodies and NGOs over the centrality of market principles in the governance of global education. The final two scenes make up the exterior parts of the administrative system that facilitated the core. Scene four examines governance through measurement. Data played a key auxiliary role in the process because it allowed for detailed calculation of inputs and outputs to ensure maximum resource efficiency and results. Dissenting actors perceived the importance of metrics as a tool for masking discrimination and framed data as a technology of power. The evidence-based policy scene completes this act. Proof of the effectiveness of market reforms in education required evidence to showcase best practice from selected cases that were promoted as benchmarks to be replicated in other settings. However, the conclusiveness of this case evidence was continually in dispute.

5.1 Scene I: Value for Money

This section explores how value for money (VfM) emerged as a priority in the process. It exposes how, what was presented in the liberal model as a logical evolution of ideas on the best way to finance and resource international education, was actually a battle of rival beliefs over the liberal governance principles of fiscal discipline and, ultimately, performance. First, the rise of VfM in education is put into context by considering trends in UK fiscal policy, the influence of cost-accounting methods on education and discourses around aid effectiveness. Section two investigates how the dominant meaning of VfM in international education was shaped by the merging of discourses that brought results-based management tools into the system administering international development. Throughout these sections we can observe a convergence in the beliefs of major donor nations, their development agencies, international bodies and NGOs over the meaning and significance of VfM as a key part of the mechanisms governing international education. The final section surveys the counter-framings that attempted to challenge norms around VfM by recasting the budgeting debate around humanist elements such as spending obligations, maximum available resources and contradictions over efficiency.

5.1.1 Public Spending, Managerialism and Aid Effectiveness

A clearer understanding of the rise of VfM in international education is aided by exploring three contextual factors. The first concerns the domestic context of ongoing public reform in the UK and the necessity to justify tighter public spending. A key document promoting VfM was the HM Treasury's Green Book, published under New Labour, which established a framework for the appraisal of all government programmes and policies. Putting cost-effectiveness at the heart of policy evaluation, the Book stated 'The purpose of option appraisal is to help develop a [VfM] solution that meets the objectives of government action' (HM Treasury, 2003: 17). Behind this drive for greater efficiency in UK public spending was the neoliberal assumption that fiscal discipline remained the chief principle guiding economic policy, thereby continuing the trajectory of the Major and Thatcher governments on welfare reform. This also meant the perpetuation

of a classic political debate over public spending between policy entrepreneurs, who perceived it as wasteful, and supporters of social justice in favour of measures to redistribute wealth. The latter was encapsulated in the views of the socialist historians who argued that welfare critics had misunderstood the true source of public funding. Reflecting on the relative merits of welfare programs, the socialist historian Harold Perkins (1996: 55) argued 'Redistribution of payments were horizontal, between those of working age, healthy and employed, and the same people when too young or too old to work, sick, disabled, or unemployed, rather than vertical, between the rich and the poor.' There were parallels between the welfare reform debate and tensions over VfM which pitched a drive for efficiency in public services against deep-rooted concerns over social equity. Reform of UK public education was a key policy area of public investment in which the case was made for greater efficiency. This was evident in the conditions for applications to establish academy schools set out in the White Paper *Schools: Achieving Success* which stated that 'Criteria for decisions will include the educational merits of the proposals, the [VfM] that they provide and the outcome of the consultation' (DfES, 2001: 44). The UK government here displayed a clear commitment to cost-effectiveness in its educational reforms. Such policy positions were legitimated through the expert authority of leading economists involved in education such as Eric Hanushek (1996: 9) who asserted that 'how money is spent appears to be much more important than how much is spent.' The assumption here was that aggressive public spending on education failed to incentivise school performance and student outcomes. Consistent with the market-oriented principle of fiscal discipline, this promoted the idea that high quality educational results could be achieved at a minimal public cost.

The second factor driving VfM was a discourse about management influenced by consultancy practices. In an article for *The Observer*, business columnist Simon Caulkin (2006) claimed that the spread of management terminology such as VfM was evidence of what he perceived as 'consultocracy' at work. Management consultants, he argued, were 'reshaping government by privatisation and importing their (often self-serving) notions of "efficiency" into the public sector, all over the world'

(Caulkin, 2006). What Caulkin seems to have been trying to convey was that consultancy had become a form of outsourcing of governmental or institutional responsibility and accountability which reflected a shift from a centralised state to multi-layered interdependent governance. In his article, Caulkin went on to describe how consultancy-style reasoning also influenced charities and NGOs through this terminology. Historically, the influence of managerial efficiency on education could be traced back to the 1940s when consultants first started advising schools in the voluntary sector. Business historian Christopher McKenna's account of a consultancy undertaken by the US firm Cresap, McCormick and Paget to complete a survey of budgetary issues at a non-profit school in New Hampshire provides a clear case in point. The recommendations of the consultation as described by McKenna (2006: 116) were 'drastic cuts in the school's non-academic staff in order to save \$72,100 annually.' The historian concluded that the school promptly followed this up by firing thirty people. Contemporary evidence of 'consultocracy' in education on a more global scale was observable in the managerial audits carried out by institutions on NGOs with efficiency as a top priority. In his article for *The Mail on Sunday* on how funding for Save the Children's education projects was at risk following an unfavourable audit by the European Commission Humanitarian Office, Chris Wilson (1998) noted 'A confidential draft report says the organisation is top heavy with management and represents poor [VfM].' That a perceived lack of efficiency was putting Save the Children's EU grant under threat illustrates how far consultancy thinking had grown in influence over institutional practices.

Growing pressure to improve aid effectiveness following the 2008 global financial crisis was the third factor driving VfM in the international education discourse. Better use of foreign aid had been a central demand of the 2005 Make Poverty History campaign, coordinated by British Overseas NGOs for Development (BOND), which pushed for greater commitments on aid to Africa at the Gleneagles G8 summit. Committing aid to education gained the approval of small 'l' liberals as an efficient and effective use of public funds to make good on the Gleneagles promises and prevent the rise of extremism in the post-9/11 era. This was also consistent with the wider shift from material aid to assistance in the form of training and policy advice.

In an article for *The Times* written shortly before becoming Prime Minister, Gordon Brown noted:

The average cost of educating a child in Africa is \$100 a year, only \$2 a week. To educate all 80 million children who do not currently go to school would cost just \$10 billion a year – that is 2p per day for every person in the richest nations. (Brown, 2007)

From this quote we can see that both the G8 commitments and cost-effectiveness measures to enhance national security were foremost in the mind of Brown. However, such liberal arguments over education as a cost-effective strategy for development were scrutinised by neoliberal-leaning actors amid concerns over austerity measures and the feasibility of foreign aid spending in the face of the budget deficit. A notable actor challenging public spending on aid in the austerity period was the Zambian economist and former-banker Dambisa Moyo (2009: xix), who argued that 'Dead Aid is the story of the failure of post-war development policy'. This dead aid rhetoric echoed the earlier comments of the World Bank economist William Easterly (2002: 44) who stated 'The aid-financed investment fetish has led us astray on our quest.' These quotes from influential economists added to the powerful public opinion shaping narrative that aid spending was being squandered in the pursuit of growth in poorer countries. Media coverage around the time of the financial crisis revealed how governments and NGOs attempted to protect aid spending against the onslaught of neoliberal-leaning actors and public backlash. In an article for *The Times*, the Chief Executive of Save the Children Jasmine Whitbread (2009) wrote 'International development, supported by smart aid, is in our interests, doesn't cost a fortune, and enjoys public support.' Deployment of the term 'smart aid' here illustrates how far Save the Children, which had been criticised by the EU in the 1990s for lacking efficiency, had gone in internalising aid effectiveness thinking. The UK coalition government used similar language to legitimise its ring-fencing of the foreign aid budget after the crisis. In his article for *The Telegraph*, Robert Winnett (2011) quoted David Cameron as stating 'The answer isn't to walk away from aid. It's to change the way we do development - so that we get real results and real

[VfM].’ Simply put, the terms ‘smart’ and ‘VfM’ were rhetorical soundbites used to legitimate the continued liberal commitment to foreign aid in the austerity era while adhering to the principle of fiscal discipline that was sacrosanct to economic liberal governance.

5.1.2 Recontextualising Results-based Management

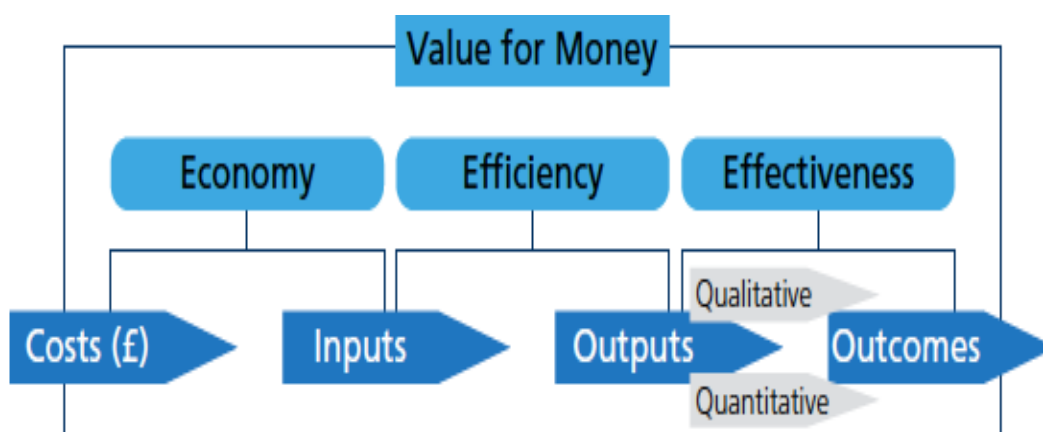
The dominant meaning of VfM in international education was shaped by a powerful discourse about management. This was observable through managerial arguments about emphasising outputs and getting results that were recontextualised in the key literature on aid effectiveness. The Monterrey Consensus on Financing Development was an important document stressing the importance of increasing aid while improving the impact of official development assistance as key to meeting the MDGs. In the Consensus, emphasis was placed on ‘coordination of aid and measurement of results’ (UN, 2002: 15). Results were also a priority in the Paris Declaration on Aid Effectiveness in which the Development Assistance Committee made references to ‘Managing and implementing aid in a way that focuses on the desired results and uses information to improve decision-making’ (OECD, 2005: 7). Both quotes sought to frame foreign aid in terms of efficiency by employing the rhetoric of performance to argue that donor and recipient actions should conform with managerial values. This signalled a shift in global governance priorities from a traditional concern with inputs to greater emphasis on outputs and outcomes with the UN, EU, European governments together with their aid departments and international NGOs all converging around this norm. Driving this convergence was a faith in results-based management that became influential in international organisations following Secretary General Kofi Annan’s 1997 reform initiative to modernise the UN by introducing budgeting measures. This initiative installed performance-based management thinking to upgrade the UN’s programme budgeting system. Signs of this shift were detectable in the UN literature on international education. The 2006 GMR noted that ‘Higher levels of national expenditure do not in themselves assure good practice and good quality. Efficiency in terms of how resources are used in the education system is key’ (UNESCO, 2006: 20). Here we see UNESCO committing to efficiency as key to meeting

the EFA targets by stressing 'how' money was spent and prioritising results by emphasising demands for 'quality'. Behind this terminology lurked underlying market-based concerns about the relationship between inputs and outcomes.

A consensus began to form around a dominant definition of VfM that emerged after the 2008 global financial crisis as pressure mounted on donors to account for the impact of every penny spent on foreign aid. DfID's (2011: 4) '3-Es Framework', with economy, efficiency and effectiveness as its key principles, was used as a definition to legitimise a stricter monitoring of aid spending while meeting obligations to fight poverty. In its UK Multi-lateral Aid Review, DfID presented a more comprehensive definition by mapping the 3-Es onto what is known as a results chain, a tool for measuring outcomes strongly associated with result-based management (see figure 9). In this definition of VfM, reduced costs were balanced against maintaining quality of inputs (economy), outputs were maximised according to given input levels (efficiency) and the outputs delivered desirable results (effectiveness). Expressing this complex process succinctly and defining VfM in brief, DfID's (2011: 3) tagline was stated as 'we maximise the impact of each pound spent to improve poor people's lives.' This definition was reinforced by The Independent Commission for Aid Impact (ICAI) in charge of reporting to the UK parliament on the effectiveness of UK aid. Detailing Britain's aid assessment procedures, the ICAI (2011: 1) noted 'Effectiveness involves achieving a sustained impact for intended beneficiaries; and [VfM] is the best use of resources to deliver the desired impact.' The extent to which this model was further legitimated by the work of NGOs was highlighted in a study by the London School of Economics which reported that multiple representatives of non-profits had incorporated the 3-E framework in their definitions of VfM. For example, the Global Advisor of Evaluation and Learning at Oxfam Claire Hutchings told the authors that 'VfM should be about economy, efficiency and effectiveness' (Emmi *et al.*, 2011: 21). The report went on to note that respondents from other NGOs had made reference to commercial values: 'some stakeholders conceptualized VfM as being primarily about good business practices' (Emmi *et al.*, 2011: 15). Some actors however, did express discontent over the

limitations of this definition. For example, the OECD Development Co-operation Directorate Penny Jackson (2012) voiced concern over the need to 'ensure that [VfM] analysis accounts for the importance of reaching different group.' This quote shows Jackson appealing to humanistic values by attempting to re-cast the model by including a fourth 'E', namely equity, in order to bring a more equitable balance to the meaning of VfM.

Figure 9. Managerial definition of VfM



DfID (2010c: 8)

Tracking the discursive journey of VfM through the literature reveals both the power this definition wielded over the non-profit sector and the importance the concept gained in the administration of international education. In a report making sense of VfM for its members, the UK network of development NGOs BOND (2011: 8) defined VfM as 'weighing up the costs and benefits of different choices and options and selecting the one that achieves the best balance across the three E's.' Here BOND both displayed a commitment to and further legitimated the 3-E model. This support for VfM was echoed in the work of Oxfam through cost-benefit analyses undertaken as part of a wider evaluation of its G8 advocacy activities. An Oxfam report reviewing a number of community-based projects asserted '[cost-benefit analysis] plays a valuable role and has added to the evidence base demonstrating [VfM]' (Chadburn *et al.*, 2013: 5). In underscoring VfM as central to the non-profit sector decision-making, it is probable that both organisations were responding to the authority of the 2010 Programme Partnership Arrangements initiative through which

DfID reviewed its support for major charities. In this initiative government support for chosen NGOs was judged on the basis of cost-effectiveness. The Secretary for International Development, Andrew Mitchell was an important voice here, stating 'We expect these charities to work hard to prove to UK taxpayers that they will and can make a real difference to the lives of the poorest and deliver real value for money' (DfID, 2010b). This extract shows Mitchell advocating cost-efficiency as key to achieving improved learning outcomes in poorer countries. The 2013 Education Position Paper from DfID (2013b: 11) made similar points, arguing that 'The UK works with a range of international partners to tackle global education challenges, funding international partners that represent good [VfM] in the pursuit of improved education results.' In the administration of international education, it was though this spread of VfM rhetoric in the education sector strategies of DfID and other major donors that results-based management norms took hold in international education. Across the Atlantic we see a similar pattern. In its education strategy for 2011-2015 USAID (2011: 6) supported this line, noting that 'unless a small investment can be justified in terms of its demonstrably high impact on policy reform, system strengthening, program integration, or innovation piloting, USAID will phase out education programs.' Perhaps the most powerful institutional endorsement was the World Bank (2011: 4) Education 2020 Strategy which asserted 'Invest early. Invest smartly. Invest for all,' adding that 'getting value for the education dollar requires smart investments—that is, investments that have proven to contribute to learning.' With that, the notion of achieving education targets on the smallest possible budget became the bottom line in the Bank's education strategy for the next decade.

5.1.3 Spending Obligations and Human Costs

Global convergence around the dominant meaning of VfM conflicted with humanist beliefs that sought to re-frame public spending according to a people-centred notion of public policy. In this rival perspective, substantial spending on education was obligatory rather than discretionary and livelihoods took priority over financial interests. That the goal of empowering the poor in low-income countries required high levels of spending was the central belief behind the 20/20 proposal first mooted in

the 1994 Human Development Report. The report proposed that donor countries set aside 20% of their aid budget for human development concerns while developing countries should devote 20% of their national budget. The economist and former Special Advisor to the UNDP Mahbub ul Haq was an important voice here, advocating for greater political commitment to spending on international education and the reallocation of financial resources. ul Haq (1995: 180) argued that 'Better allocations of existing aid funds can become the best argument for an increase in their level. The skill lies in convincing the donor community that better allocations of existing resources are no substitute for urgently needed additional funds.' The main analytical observation to be drawn from this quote is that behind this moral argument was the humanist belief that foreign aid commitments were the minimum funding requirement, and that nations could and should maximise contributions by offering 'additional' resources. In making this point, ul Haq was harking back to the rights-based notion of maximum available resources stipulated in the ICESCR which valued heavy investment. Specifically, Article 2(1) stated:

Each State Party to the present Covenant undertakes to take steps, individually and through international assistance and co-operation, especially economic and technical, to the maximum of its available resources, with a view to achieving progressively the full realization of the rights recognized in the present Covenant by all appropriate means, including particularly the adoption of legislative measures.
(UN General Assembly, 1966)

The assumption here was that anything less than a 'maximum' financial commitment of public funds and foreign aid sufficient to the achievement of economic and social rights was a breach of international human rights law. Notionally, maximum available resources provided a foundation upon which to challenge the dominant meaning of VfM and the underlying logic driving the marketisation of education.

Humanist arguments in support of higher levels of public spending on education tended to be articulated through legal argumentation that

perceived the ICESCR as constitutionally binding. This reflected a wider trend of human rights becoming transformed from declaratory rhetorical statements into international law and therefore legal obligations. Discussing the fiscal ramifications of guaranteeing equal rights in education in her background paper for the 2003-04 GMR, Katarina Tomaševski (2003b: 38) argued 'The correspondence between children's entitlement to quality education and the government's obligations in the form of constitutionally guaranteed educational allocations is an important step in advancing rights-based education.' This was a clear example of humanistic framing, with Tomaševski appealing to the notion that 'educational allocations' were an obligatory and statutory duty rather than a discretionary option. Tomaševski (2003b: 38) went on to note that 'budgetary allocations often force education authorities to distribute insufficient funds amongst a variety of nationally or locally defined priorities, while the funds are insufficient for meeting any of them.' What Tomaševski seems to have been trying to convey was that contradictory forces were at play in the claims made by VfM advocates that results could be achieved by prioritising cost-efficiency. This reasoning was also at odds with the underlying humanistic belief in support of deploying maximum available resources necessary to ensure the necessary investment, thereby guaranteeing the right to education. The 2003 GMR made similar points, noting that 'in resource-poor systems, most of the available options for increasing quality require larger expenditures' (UNESCO, 2003b: 99). The report went on to describe national spending commitments as 'constitutional and legislative' (UNESCO, 2003b: 196). From this quote we can observe the extent to which this GMR was shaped by Tomaševski's arguments and how far this counter-framing went in penetrating public administration norms connected with economic liberalism to include humanistic beliefs as an element of the transnational governance of states.

In addition to legal lines of argumentation, rival actors also challenged the managerial discourse around cost-effectiveness by deconstructing the meaning of efficiency. As a central mediating factor in the dominant definition of VfM, the term 'efficiency' implied that outputs were maximised according to the *financial* cost of given input levels. The sociologist

specialising in human rights and economic policy Diane Elson, however, was critical of this. Elson (2013: 24) argued that 'what looks like an increase in efficiency in use of financial resources is instead revealed as a transfer of costs in terms of human resources.' We can clearly observe a social framing of efficiency here in Elson's contention that managerial notions of efficiency ignored the hidden 'human' cost of inputs. Putting this in educational terms, although the wages and benefits of teachers may be cut or their workload increased as a result of redundancies to reduce costs, the same or greater level of human effort would be required to deliver similar educational outcomes. Cast in this way, human dignity was brought in from the margins in public policy debates over VfM. In many respects, this counter-framing echoed the concerns of earlier sceptics of managerialism. For example, in an article for *The Independent*, the historian Peter Hennessy (1990) had warned of 'socially-created disasters caused by skimmed public services,' This article clearly employed a *topos* of threat to dispute the managerial priority of fiscal discipline with reference to the potential 'disasters' caused by prioritising financial efficiency. For critics of the contemporary definition of VfM, these potentially negative consequences further highlighted the above-mentioned contradiction in the relationship between the 'efficiency' and 'effectiveness' parts of the model. This brings us back to Diane Elson (2013: 24), who endorsed this perspective: 'Services must be delivered in ways that respect the individual's dignity, and this may require more time to interact with people and give them personal attention.' In other words, positioning humans as central to the meaning of effectiveness placed greater emphasis on the quality of the outputs produced, and when applied to public education this implied higher educational standards. These comments resonate strongly with proposition that humanisation was driving the process governing international education. This is reflected in the people-centred perspective taken by Elson on issues of efficiency and effectiveness to underscore the contradictory nature of the relationship between inputs and outputs secreted in the dominant VfM model.

In sum, VfM emerged as a priority in the process driving the governance of international education. Convergence around efficiency as a vital means of achieving desired outcomes, as reflected in the practices of Western

governments, institutions and NGOs, provided a contextual backdrop for understanding how managerial norms around VfM discursively influenced the aid effectiveness agenda. Austerity pressures following the global financial crisis together with the recontextualisation of powerful beliefs in results-based management combined to legitimate support for the dominant definition of VfM that sedimented in international education. Humanist efforts to counter this by re-framing spending on education according to the legal notion of maximum investment had limited impact in weakening the pro-market VfM approach since attention had already shifted away from volumes of spending and onto *how* public funds was being spent. Critics of the dominant definition of VfM did, however, mount a challenge by recasting elements of efficiency and effectiveness to reflect human interests. Having explored how VfM gained a powerful marketising grip over the process, the next scene investigates the disputed discursive terrain around the private sector practices thought best placed to deliver on these demands for greater efficiency and results.

5.2. Scene II: Partnerships

This scene explores the beliefs behind partnerships in international education that blended state and private sector provision, referred to as Public-private partnerships (PPPs). It reveals how PPPs, far from being a consensual matrimony of the two sectors, carried discursive baggage which when unpacked revealed cleavages in expectations and motivations that constructed a deeply conflicted part of the process. Analysing PPPs is a daunting task when considering the term itself is 'dangerously vague' (Standing, 2010: 64), but this analysis is assisted by organising the scene around two broad framings in which concerns over efficiency and equity intersect with beliefs about the roles of the private sector and the state. Section one investigates how representations of the state as an incompetent bureaucracy delegitimised the role of the government as the primary education provider. This opened up a discursive debate over the extent to which market-based reforms led to more efficient modes of delivery. Section two exposes the rival mindsets behind arguments that supported or denied the more equitable dimensions of PPPs in education. It shows how the school choice model casting parents in the role of consumers collided with the notion that states needed to regulate the private sector to avoid the discriminatory effects of market forces.

5.2.1 State Wastefulness and Market Efficiency

Framings of private sector practices as an efficient additive to pure state provision contributed towards a powerful discourse driving market-based reform in international education. The context for this was a narrative in the Western media about how state education in the UK and US was in a continual state of crisis. The British education system was frequently targeted as unfit for purpose and branded a weak model to export to poorer countries through foreign aid programmes. In an article for *The Sun*, Trevor Kavanagh (2006) argued 'our 30-year experiment with state schools has been a flop' and went on to warn donor agencies against replicating 'bog standard comprehensive teaching, UK style'. Similarly, the US state education system was also portrayed as being in a critical condition. Serving

as a feature-length promotional piece for charter schools across North America, the documentary *Waiting for Superman* (2010) noted:

You've got local school boards, people from the State Departments of Education, Federal Department of Education, district superintendents and their huge staffs. The things we've done to help our schools work better have become the things that prevent them from working. This whole collection of people, which is sometimes called 'The Blob,' like out of some horror movie, has been an impediment to reform.

Likening the public administration of education to 'The Blob', a reference to a fictional alien amoeba that expands the more it aggressively devours people and communities, reflected the neoliberal-informed belief that stifling bureaucracies with 'huge staffs' resulted in inefficient education provision. These quotes sought to frame government as an inept intruder and cast doubt over the competence of the state to deliver quality schooling.

Media portrayals of the state as an unresponsive bureaucracy monopolising education and obstructing reform reflected how the consensus among education policy elites and economists had penetrated the media. The US education policy experts and authors of the widely-publicised book *Politics, Markets, and America's Schools*, John Chubb and Terry Moe (1990: 3) were important voices here, arguing in favour of 'institutional reform' with greater competition and less bureaucratic interference in public education. The OECD (2003a: 10) endorsed this perspective, emphasising 'the need for revitalisation of school organisations away from the bureaucratic, "industrial" models of education [...] to be replaced with [...] professionalised, flexible models appropriate for the post-industrial age.' Similar arguments were made by education economists who promoted private sector practices and involvement in poorer countries as an efficient solution to meeting increased demand. Arguing in favour of a greater role for the private sector, the World Bank consultant and academic Estelle James (1991: 359) noted that this 'would enable education and other services to grow without imposing additional costs on the public treasury,' adding that 'the discipline of the

market would force private schools to operate efficiently.' James echoed the comments of the Bank's senior economist George Psacharopoulos (1986: 3) in support of decentralising governance: 'Easing these controls mobilizes additional private and local resources for education without excessively increasing the government's fiscal burden.' The assumption here, in line with the belief that marketisation ought to be the fundamental dynamic driving the process, was that reforms limiting the role of the state would increase efficiency and ultimately revitalise international education.

The value international organisations placed on reducing the burden of public spending in poor countries was a key ideational driver in the discursive rise of education PPPs. Whereas governments in wealthier nations actively promoted and practiced reform through academies (UK) and charter schools (US), low-income country governments with limited capacity and means to respond to such challenges were more passive in the policy debate. The World Bank and UN agencies were instrumental here, using their expert authority to persuade poorer countries of the merits of private sector provision in meeting institutional goals. Referring to the challenged of achieving UPE, the World Bank's International Financial Corporation (IFC) wrote 'With public funds for education stagnant or declining in real terms in many countries, policies of universalization of elementary or even secondary education are facing significant impediments to implementation' (EdInvest/IFC, 2001: vi). Concerned with the effect of budgetary constraints on meeting the EFA goals, the 2002 GMR similarly argued 'The extent to which people choose to educate their children in private schools needs to be considered, because its incidence may reduce the amount of public spending required' (UNESCO, 2002: 137). These quotes show influential international bodies rationalising private sector practices as an efficient means of achieving institutional goals in countries where the state lacked the resources and capacity to finance and provide for the educational needs of their people. In doing so, the World Bank and UNESCO were further legitimating the recommendations of the Delors report:

Education is a community asset which cannot be regulated by market forces alone [...] The Commission none the less does not underrate the force of financial constraints and it advocates the bringing into operation of public/private partnerships. In developing countries, the public funding of basic education remains a priority, but the choices made must not imperil the coherence of the system as a whole, nor lead to other levels of education being sacrificed. (International Commission on Education for the Twenty-first Century and Delors, 1996: 41)

This quote from the Delors report resonates strongly with the enterprising trend towards quasi-privatisation. Although dismissive that 'market forces' should be allowed to roam freely in education, the report conceded that 'partnerships' offer a solution to the public spending issue that 'imperil' progress on raising educational standards and meeting targets in poorer countries.

Another factor driving the norm that PPPs were an efficient solution to education provision was the promotional discourse of policy entrepreneurs. Charities such as the CfBT Education Trust and studies authored on behalf of the World Bank were typical transmitters of this advocacy. Michael Latham, a consultant for the CfBT, and the independent public policy consultant Norman LaRocque were key voices in championing education PPPs and facilitated the World Bank in building associated policies into the conditionality of loans to poorer nations. Spelling out the financial rationale for PPPs in a report for EdInvest, a joint initiative between the IFC and the CfBT Education Trust, Latham (2009: 5) made reference to 'Sharpening competitive pressures in the education sector, thus generating efficiency gains and spurring greater innovation in education delivery.' In a report for the CfBT, LaRocque (2008: 8) endorsed this perspective, noting that 'The essential role and responsibility of the private sector in all PPPs is to deliver the business objectives of the PPP on terms offering [VfM] to the public sector.' These were clear examples of the efficiency framing of PPPs that indicated how partnerships and VfM were mutually supportive mechanisms in the process. The work of both policy entrepreneurs was performative in

that their ideas added legitimacy to the World Bank's education reform literature. One example was an education note co-authored by LaRocque and the Bank's Education Practice Manager Harry Patrinos (2007) which argued that PPPs 'provide greater scope for increasing efficiency and innovation in the delivery of education.' The Bank's major publication on education PPPs agreed, noting that 'Governments can choose private providers in PPP contracts by means of an open bidding process [...] the contractor with the best or lowest cost proposal is then chosen' (Patrinos, Barrera-Osorio and Guáqueta, 2009: 4). Here, we can see language similar to that of Latham and LaRocque promoting the efficiency gains of PPPs to poorer nation states with limited budgets. This discursive collaboration between the Bank and leading consultants produced a powerful sounding board which validated beliefs about partnerships as an efficient means of education provision that proved influential in garnering support in poorer countries. This was evident in the documents of regional education networks such as Asia South Pacific Association for Basic and Adult Education (2013: 15) which stated 'Governments, especially those with loan conditionalities to abide by, play a significant role in adopting laws and policies supporting PPPs as a means for reducing pressure on diminishing revenues.' This quote reflects the persuasiveness of the World Bank's arguments that education partnerships offered a solution to the financial problems low-income governments faced in balancing their budgets and servicing loan repayments.

The air of acceptability around education PPPs that developed from this dominant efficiency framing of partnerships proved difficult to weaken. Academics critical of market trends in education funding and delivery, however, offered discursive resistance by framing PPPs as new form of predatory capitalism. Sceptical of how efficiency arguments had been used to promote partnerships, the expert in education reform Joseph Zajda (2006: 15) described this as reflective of 'the managerial and conservative culture of efficiency and profit-driven organisations – characteristics of neo-liberal ideology in the economics of education.' Similarly critical of this ideological orientation, the welfare economist Guy Standing (2010: 64) described PPPs as a 'mechanism for enabling multinationals to penetrate a

particular public service'. These comments resonate when viewed from a perspective informed by struggles against the marketisation of education. Their arguments were shaped by the belief that the efficiency framing of PPPs masked the ideological preferences of powerful neoliberal-leaning governments and IFIs that dominated international education. Another aspect of this counter-framing points to concerns over how the drive to unleash market forces in education contradicted social liberalism and its aspirations for schooling of a public nature. Questioning the compatibility of market and state, the education theorist Ruth Jonathan (1997: 5) argued 'In any open society the social practice we call education must represent the limiting case of the free market.' Jonathan (1997: 6) went on to note that 'the state's abdication of responsibility for social evolution in favour of the blind forces of the market strips it of any substantive role.' The assumption here was that the state played a leading role in public education and that reducing this to supervision of the private sector, for purposes of efficiency or otherwise, represented a betrayal of civic values central to liberal egalitarianism. Although rival beliefs did little to weaken the dominant efficiency frame that legitimated market forces in international education, framings around equitability proved more rewarding in reclaiming discursive ground.

5.2.2 Choice, Freedom and the Equity Dilemma

Considerable frame conflict was observable over the notion of equity and the extent to which expanding school choice justified a more dominant status for private sector practices. This section highlights tensions embedded in the discourse that emerged from this difficult relationship between equity and choice. Public education reforms in the UK and US produced an enabling discourse allowing PPPs to flourish internationally under the banner of promoting equity. In British politics, support for this discourse had developed over the decades preceding the period of study. Quoting the views of a left-leaning Conservative junior minister on education reform in an article for *The Observer*, the journalist Barry Hugill wrote:

We know that if we can get the parents involved then we can improve the schools [...] Give them the voucher and tell them 'you're in control'. The councils have screwed it up, to be frank we haven't made much of a job of it, so let the market decide. (Hugill and Narayan, 1996)

This was a historical example of the equity through school choice frame in use, with the quoted junior minister appealing to the idea of how 'voucher' schemes offering choice would enable the children of aspirational working classes families to attend better quality schools. Putting the underprivileged in control in British education was far from an original solution. This idea harked back to the period pre-dating the 1870 Education Act when the working classes, inspired by the Chartist movement, independently organised school provision. Reflecting on the spirit of classical liberalism of those times in his essay *On Liberty*, John Stuart Mill (1991: 117) noted 'It might leave to parents to obtain the education where and how they pleased, and content itself with helping to pay the school fees of the poorer classes of children.' The assumption was that parents ought to be granted the fundamental liberty to choose 'where' their children went to school and that this freedom benefitted 'poorer' sections of society.

Enabling parents from disadvantaged areas to choose better schools for their children inspired contemporary UK education reform observable in the grant-maintained schools system introduced by the Conservatives as well as the academies and free schools of New Labour. Victoria Dock Primary, the first private finance initiative school opened in 1999 through a contract between the Labour government and the Sewell Group, provided a blueprint for the White Paper *Schools: Achieving Success*. This model prioritised diversification over uniformity promising 'greater choice for the consumer' (DfES, 2001: 6). The paper sought to frame parents and students as consumers, a discursive hallmark of the policy literature on school choice and reflective of the market trend towards a clearer distinction between service users and providers. The Labour government's 2005 education White Paper took a similar line and is worth quoting at length:

We need to create a schools system shaped by parents which delivers excellence and equity – developing the talents and potential of every child, regardless of their background. A system that can rapidly open to good new providers who can help make this happen. One that will empower parents and give schools the freedoms and incentives to focus on the individual needs of every child. To respond to parental demand, we need to expand choice, create real diversity of provision, and to ensure that the benefits of choice are available to all. (DfES, 2005: 20)

Here we can witness how the entrance of private ‘providers’ in education was rationalised through a drive for greater ‘equity’ that promised to ‘empower parents’ and ultimately widen ‘choice’. Meanwhile, a similar pattern of reform could be observed in the US education policy literature. Central to the No Child Left Behind framework promoting charter schools was the notion of ‘more choices for parents and students’ (U.S. Department of Education, 2002). School choice in America had long been legitimated by the personal authority of education economists such as Henry Levin (1991: 137) who argued ‘Choice is considered to be something that is good in itself and that is a crucial indicator of the freedom of a people.’ These comments resonate when viewed from a perspective informed by marketisation, with the values of consumer preference and quality assurance particularly salient, in that users could punish or reward education providers by either consuming their educational services or taking their custom elsewhere.

These framings of market-based education reform from both sides of the Atlantic constructed an enabling discourse which supported the ‘academisation’ (or, ‘charterisation’) of education elsewhere, with school choice held up as an equitable model to be implemented in low-income countries. Consultants and policy entrepreneurs were instrumental in promoting PPPs as a pro-poor formula through their research for international organisations. Advocating in favour of partnerships for the World Bank’s Private Sector Development Department, the consultant Stuart Bell (1995: 3) argued that voucher schemes ‘target the benefits of privatization to disadvantaged segments of the population’. In a report for

the Institute for Economic Affairs promoting private education business, the so-called edupreneur James Tooley (1999: 82) argued that such enterprises were 'providing courses that cater for a wide range of socio-economic groups, including some of the poorest groups in society.' These quotes sought to frame PPPs as an equitable solution to educating the underprivileged and the influence of these ideas was observable in the education policy decisions of major donor agencies. For example, DfID (2001: 26) noted that 'The private sector may be able to relieve pressure on government by developing sustainable private education options, offering choice, specialism and the sharing of facilities and expertise.' USAID (2000: 14) made similar points, arguing that 'The aim is to make the educational system more responsive to its ultimate customers—parents seeking a decent education for their children.' This perspective was also supported in the 2004 WDR which made reference to voucher schemes and scholarships as arrangements that 'enable clients to exert influence over providers through choice' (World Bank, 2003b: 6). From the above quotes we can see that framing partnerships as an equitable model of education provision for the poor was foremost in the minds of consultants and major donors. The assumption was that free-market principles were universal and that incorporating private sector actors and practices into international education policies would deliver the same benefits to the disadvantaged in poorer countries as they had in wealthier ones.

Discursive resistance to this seemingly uncritical support for PPPs as an equitable approach was formed around two waves of ideological resistance. The first, led by the anti-neoliberal beliefs of rival academics, offered a critical perspective on the social effects of market forces in education which succeeded in penetrating the institutional discourse. One important voice was the educational sociologist Geoff Whitty (1997: 5) who argued 'the creation of quasi-markets is likely to exacerbate existing inequalities, especially in instances in which the broader political climate and the prevailing approach to government regulation are geared to other priorities.' The education theorist Michael Apple (2006: 66) followed a similar line to Whitty, noting that 'Markets systematically privilege families with higher socio-economic status through their knowledge and material resources.'

These quotes sought to reframe PPPs as an antagonistic factor in the wider trend of existing inequalities reproduced by the neoliberal tendency towards promoting free-markets. This counter-framing was performative to the extent that its inherent warnings shaped concessions in the official EFA monitoring documents. Focusing on inequality in education, the 2009 GMR noted:

Introducing choice and competition into an environment characterized by high levels of inequality without effective public action to equalize opportunity is a prescription for widening disparities. As in many other areas, markets – and quasi-markets – in education are unlikely to prove effective in strengthening equity in the absence of pro-poor regulation. (UNESCO, 2009: 152)

The assumption here was that policies promoting PPPs, far from guaranteeing greater 'equity', were further embedding market forces in the education sector and that this necessitated 'regulation' to guard against the threat of worsening 'disparities' in poorer societies. These comments were reiterated by the educationalist Pauline Rose who acted as a Senior Policy Analyst at UNESCO and contributed to the GMR. Rose (2010: 473-474) worried that PPPs were 'insufficiently developed in national planning, with potential adverse consequences for equity', adding that this was aggravated by 'an international neoliberal agenda advocating a reduced role for the state'. The main analytical observation to be drawn from these comments is that concerns over the impact of PPPs on equality resonated with wider anxieties over the marketisation of education being advanced under the banner of rampant neoliberalism.

The second wave of discursive resistance took a distinctly rights-based approach and highlighted unease in the way that the equity framing of PPPs sat with humanists. At the heart of this resistance was the struggle to reassert state control over partnerships and tackle discrimination in education using human rights legislation as a regulatory framework. The human rights law scholars Fons Coomans and Antenor Hallo de Wolf built on this topic:

Decisions to start privatisation in the sphere of education, grounded in the rationale of efficiency, should from a human rights perspective, not increase inequality in society, but rather contribute to a better realisation of the [right to education] for vulnerable groups. Seen from this angle, a state has an obligation to respect existing levels of protection. (Coomans and Hallo de Wolf, 2005: 240)

This report clearly employs a *topos* of law to argue that states had a legal 'obligation' to 'respect' rights legislation, protect disadvantaged individuals from the harmful social effects of markets and curb rights violations by the private sector. Here we see language similar to that used in the General Comments supporting article 13 of the covenant on the right to education by the UN CESCR. Setting out state obligations, comment 47 noted that governments were required to 'avoid measures that hinder or prevent the enjoyment of the right to education,' and 'take measures that prevent third parties from interfering with the enjoyment of the right to education' (CESCR, 1999). From these quotes we can observe the tensions embedded in the right to education between a social responsibility to protect free access to quality education without discrimination and that of respecting parents' freedom to attend or establish private schools. Concerned that stricter regulations were necessary to prevent PPPs exploiting these tensions, the Right to Education Project (2014: 17) argued that 'National regulatory frameworks and national policies must include a means for assessing equality in education and incorporate measures to limit private educational freedoms to ensure equality.' The Special Rapporteur Kishore Singh took a similar line, arguing that 'states have the obligation under human rights law to establish conditions and standards for private education providers' (UNHRC, 2014: 21). These humanist strands of discursive resistance were performative in that they acted as a catalyst for the adoption of the Abidjan Principles, a guiding framework on the human rights obligations of nation-states to provide public schooling and supervise private involvement in education. Acting as a new reference to address social tensions around PPPs, the Abidjan Principles (2019: 4) noted 'States must not permit the freedom to set-up or attend private schools to infringe

on either the right to free, equitable, and inclusive education for all, or the rights to equality and non-discrimination.’ The assumption here was that applying a rights-based regulatory framework to PPPs could tackle the social imbalances caused by market forces in education while reinforcing the notion that humanisation remained central to the process governing international education.

In sum, this scene revealed how the advancement of quasi-markets in international education emerged as a significant yet ideologically divisive dynamic in the administrative system. Powerful framings around PPPs as a policy approach to efficiently fund and provide education supported by a narrative about bureaucratic incompetence and wastefulness in wealthy nations influenced donors and governments to employ the same strategy in poorer countries struggling to meet EFA goals on limited budgets. This dominant representation proved overpowering in the discourse and served to reinforce the priority of cost-effectiveness driving the process in line with market-based beliefs. Greater discursive resistance was met by equity framings of PPPs that notionally promoted partnerships around school choice, parental empowerment and social mobility. Ideologically opposed to these equitable claims, anti-neoliberals and humanists managed to disrupt this uncritical support by exposing adverse social consequences and promoting regulatory mechanisms. Before proceeding to survey the exterior and supporting mechanisms in the process, we shall explore accountability as the remaining element at the discursive core of the administrative system governing international education.

5.3 Scene III: Accountability

This scene explores the divergent beliefs that produced opposing meanings of accountability in international education in terms of *who* was accountable to whom and *what* those in positions of responsibility were ultimately accountable for. Section one investigates how policy entrepreneurs and the institutions they served represented accountability as an enabler of market reform in education through a powerful performance framing. Section two explores two ideologically-driven counter-narratives at odds with this dominant framing, one based on anti-corruption and fairness, and the other centred on the judicial imperative of guaranteeing the right to education.

5.3.1 Performance Accountability

The political context behind the emergence of this dominant framing was the governance trend that brought about a shift from vertical accountability, which valued bureaucracy, to a horizontal model that supported decentralised responsibility. This reflected a tendency in public policy to phase out accountability for rules and financial inputs and replace this with a model emphasising results and outputs. This pattern was observable in education reform literature on both sides of the Atlantic. In the UK, school accountability was fundamental to New Labour's education reform. The White Paper *Schools: Achieving Success* noted 'Central to achieving higher standards is the confident, well-managed school, running its own budget, setting its own targets and accountable for its performance' (DfES, 2001: 63). Education reforms in the US under the No Child Left Behind act endorsed this perspective with the promise to 'give States and school districts unprecedented flexibility in the use of Federal education funds in exchange for strong accountability for results' (U.S. Department of Education, 2002: 2). These quotes show preference for a horizontal and decentralised accountability model supportive of promoting greater school autonomy. This preference was underscored by the OECD (2003a: 15) that stressed 'making schools more accountable to parents and the public can be characterised in terms of the shift from supply-driven systems to demand-sensitive schooling.' The underlying assumption here was that a more direct accountability route justified public reforms because it made

schools more responsive to parents, incentivised performance, improved learning outcomes and strengthened correlation between resources and results.

Acceptance of the notion that accountability formed a key factor improving school performance in poorer countries was legitimated in major World Bank policy reports and the research produced by its staff, like-minded policy entrepreneurs and ideologically aligned NGOs. The World Bank (2011: 5) Education Strategy 2020 made reference to 'Increasing accountability and results as a complement to providing inputs'. This report plainly represented accountability in line with performance by placing priority on results. Empirical literature further legitimated this framing through the expert authority of elites who supported initiatives to promote evaluation and communication through simple feedback tools. School reports cards were one such tool that encouraged and enabled parents to award scores to their child's school based on educational performance. One study led by the Bank economist specialising in education Barbara Bruns (2011: 14) positively described report cards as a promoter of 'client power'. Reporting the results of school report cards in Pakistan, a study for the Bank's Development Research Group led by the economics scholar Tahir Andrabi (2015: 3) argued that 'In treatment villages, the average child's test score increased by 0.11 standard deviations or 42 percent of the average yearly gain.' Similar arguments were made in research conducted on a scorecard initiative in rural India by the CfBT Education Trust. The study led by the development economist and Director of the Centre for Economic and Social Studies S. Galab (2013: 4) concluded that 'The judicious use of this "short route" of accountability is seen as a way of increasing "return" without greatly increasing expenditure: a cost-effective way of driving basic school improvements in resource-poor settings.' In these quotations we can observe language similar to that used in the 2004 WDR which first conceptualised accountability around incentivising performance in public services to better serve the needs of the poor. This report defined the distinction between the short and 'long route' to accountability, noting that while the former suffered from 'no direct accountability of the provider to the consumer', the latter by-passed state involvement thereby increasing

'client's power' over education providers (World Bank, 2003b: 6). In other words, traditional models based around weak accountability of state education providers to end users was the root cause of poor quality and inequitable results. The short route on the other hand, consistent with market values, sided with school choice and voucher schemes as cost-effective policies through which disadvantaged families could exercise 'client power' and hold schools more directly accountable.

Convergence around performance accountability as a norm in the administration of international education was evident in the literature of major development departments and the UN agencies. Reporting on its programme in Mozambique which utilised mobile technology to publish teacher performance data, DfID (2013b: 8) argued that the programme provided 'real-time data and feedback to head teachers and communities using mobile phone and internet technology to monitor and report on teacher attendance.' Touching on cases in South Asia in its Education Strategy, USAID (2011: 11) made similar points, arguing that 'community and parental engagement in education is a vital force in the effort to remove barriers to quality education, mobilize scarce education resources, and increase accountability for results in learning.' We can observe here a performance-based framing through the manner in which these extracts cast local communities and parents as empowered consumers evaluating school standards. We also observe this influence in UNICEF's post-2015 Strategic Plan for international education:

The creation of direct accountability mechanisms, such as school management committees, allows parents and communities to have a direct say in the functioning of their children's schools. This strengthens results-based management at the school level and shortens the accountability route, which will improve school performance, particularly for learning. (UNICEF, 2015: 93)

This quote shows UNICEF endorsing the short 'route' to accountability and the underlying belief that educational standards could be improved by putting the poor at the heart of service provision thus empowering them to

monitor providers and discipline those deemed unacceptable. This convergence resonates strongly with the precepts of market control that place importance on measures of performance and getting results.

Ideational tensions around the emerging norm of performance accountability were evident by observing the discursive resistance of academic actors in the broader field of politics who highlighted the contradictions at play between accountability and achieving results. In their assessment of the accountability-performance relationship, the political scientists Tom Christensen and Per Lægreid (2014: 213) argued that 'In reform situations there is often disagreement about what constitutes improvement and for whose benefit improvements are made, which makes the relationship between performance and accountability even more blurred.' The public policy scholar Robert Behn (2001: 29) made similar points, arguing that 'Most public managers make damn sure that their organisation is audit-proof [...] Then, if they still have any time, resources, organizational capacity, or flexibility left over, they will try to improve performance.' These are clear examples of a counter-framing that, driven by small 'l' liberal beliefs, appealed to the notion that accountability actually diminished performance rather than improving it. A key aspect of this contradiction, indicated by Behn, was that reforms intended to shift attention away from managing inputs and complying with regulations but towards output controls and achieving results, actually brought about performance audits that concentrated more on rule compliancy. This argument was picked up on and applied to the ongoing debates in public education by the educationalist Gert Biesta (2010: 51-58) who claimed that accountability in education had taken on a technical-managerial meaning, with a focus on the 'duty to present auditable accounts' and 'being accountable to the regulators'. These claims were performative in that they influenced the critical perspectives advanced in the institutional literature on accountability in international education. The 2017-18 GEMR argued stated 'Incentives have often been limited to punishments to force compliance or modify behaviour' (UNESCO, 2017: xiv). The report went on to note that this had amounted to a 'blame focused approach to accountability' (UNESCO, 2017: xiv), pointing out that incentives including

performance-related pay led to the scapegoating of teachers which encouraged conformity and uniformity in the ranks to avoid punishment.

A more radical counter-framing was deployed in the surrounding discourse by academics ideologically opposed to the communion of performance and accountability. Concerned that the term had become amenable to actors promoting performativity, the social science and development scholar Jonathan Fox (2010: 246) argued that 'While accountability has long been the watchword of human-rights movements around the world, calling for truth with justice, technocratic managers and anti-union politicians also use it to impose their goals on ostensibly unresponsive public bureaucracies.' From this quote we can see that a counter-framing of results-based accountability was foremost in the mind of Fox, with 'goals' taken to imply reform measures such as decentralisation and contracting out. This perspective was supported by the policy analyst Kanishka Jayasuriya (2008) who employed the term 'retail governance' to describe the rise of performance-based accountability structures in global governance. In the field of education, this scepticism was shared by the globalisation and school reform scholar Joseph Zajda (2006: 9) who argued that 'The attack on the State's monopoly of public schooling continues to be based on accountability.' These comments resonate strongly with critical perspectives on the marketisation of education since they oppose the neoliberal values driving what they perceived as the abuse of accountability to advance market-based reforms in public education. Historically, this tension between non-state actors performing governmental roles and accountability could be traced back to the creation of semi-autonomous regulatory bodies, or quangos, introduced in the Britain under the Thatcher and Major governments. An outspoken critic of such bodies was the social historian Harold Perkins (1996: 69), who argued that they were 'unelected' and 'accountable to no one'. The main analytical observation to be drawn from this counter-framing is that the discursive rise of performance accountability in the administration of international education was critically judged as reflective of how enterprise principles had been imposed on global governance structures. Having surveyed these disputes, we now turn to the

rival narratives that sought to further weaken the discursive grip of the performance accountability frame.

5.3.2 Anti-corruption and Rights Legislation

This scene proceeds by exploring how dominant performance framing was at odds with two counter-narratives about accountability. One argued for a political definition that prioritised holding governments accountable for expenditure and equitable behaviour in the administration of schooling, while another narrativised accountability through a judicial framing that sought to balance rights with responsibilities and legally enforce the right to education. Taking the former to begin with, this small 'l' liberal narrative took the need for political systems to prevent and tackle corruption as its ultimate priorities. Stating the objectives that regulatory environments were designed to achieve, the public policy academic Robert Behn (2001: 9) was an important voice here, giving reference to 'a proper use of public funds and the fair treatment of citizens'. Preventing the unlawful diversion of public funds was important in the statements official bodies gave on the accountability model best suited to promoting development through education in poorer countries. In a combined report between UNESCO and the International Institute for Educational Planning outlining the entailments of preventing corruption in education systems, Jacques Hallak and Muriel Poisson (2007: 21) listed 'creating and maintaining transparent regulatory systems, strengthening management capacities for greater accountability and enhancing ownership of the management process.' These quotes sought to frame accountability as a liberal rule-based system responsible for finances and fairness that stringently held leaders responsible for abuses of power.

Behind this seemingly uncontroversial counter-narrative, however, there lurked tension as small 'l' liberal principles of fairness and tackling corruption were perceived by some as incompatible with the performance model. Concessions to this effect had already been accepted by the education policy entrepreneur Norman LaRocque (2005: 53) who noted that contracting could 'create opportunities for corruption in contract awards,' adding that it may also 'reduce already low levels of government

accountability and control.’ This concession was seized upon by critics of private sector involvement in education, and public services more broadly, who further emphasised potential abuses. The Special Rapporteur Kishore Singh observed LaRocque’s focus on corrupt practices in international education, noting that ‘Corruption by private providers remains unscathed owing to the lack of financial regulations, scrutiny of their operations and control mechanisms’ (UNHRC, 2014: 21). Sceptical of why anti-corruption had become so prioritised in the literature, the development anthropologist Elizabeth Harrison (2010: 261) took this argument further, asking ‘does the focus on anti-corruption, with its attendant increase in privatisation, concessions, and contracting-out, in turn open the door for greater corruption?’ The assumption here was that corruption concerns were a hidden symptom of the marketisation of education and that accountability measures sincerely targeted towards tackling foul play were at odds with this process.

Investigations into corruption and misuse of British aid allocated to education PPPs in Pakistan provide a useful case study that well illustrate the above tensions. In the right-leaning British press, the case was reported in the context of stolen UK aid as justification for the reductions in the aid budget as a preferred post-Brexit foreign policy. In an article for the *Daily Mail*, the political journalist James Slack asserted:

Britain committed £700million to help impoverished children in Pakistan but corrupt officials creamed off vast amounts. In one province, it was found that the money was diverted to as many as 5,000 schools and 40,000 teachers that did not exist. (Slack, 2016)

This quote shows Slack making the claim that the UK aid budget had been wasted on DfID’s Punjab Education Sector Reform Roadmap project that had allegedly been abused by ‘corrupt officials’ in Pakistan. This project was reflective of tensions around accountability since it prioritised results and responsiveness to the needs of the parents but lacked the necessary regulation to protect against corruption. In its 2010-15 Education Strategy, DfID stated:

We are committed to improving the governance of education systems, to strengthening financial management and to combating corruption. We will suspend UK funds when there is evidence of misuse. This is critical, not only to safeguard UK assets but to improve the efficiency of all resources, to strengthen accountability between service provider and consumer, and to drive up standards. (DfID, 2010a: 45)

This was a clear example of the accountability model applied to the Punjab project, with the intention to tackle 'corruption' and the 'misuse' of 'UK funds' on the one hand, and the imperative of responding to 'consumers' and raising 'standards' on the other. Counter-arguments based on these tensions in the academic and institutional literature challenged this perceived incompatibility through the *topos* of abuse. Highlighting corruption in the Punjab Education Foundation, an autonomous body promoting education partnerships in the province, the educationalist Roy Carr-Hill (2013) argued that 'The growth of private sector involvement in providing education increases the likelihood and possibilities of corruption.' This study represented education PPPs in Pakistan as havens of malversation and went on to illustrate how deficiencies in data and monitoring responsible for holding schools accountable for results that had failed to prevent corruption. A related investigation into so-called 'ghost schools' in Pakistan by Transparency International's country adviser Syed Adil Gilani (2013: 42) made similar points, arguing that 'the information collected through surveys is finalised at school level by the very teachers being evaluated, with no independent evaluation of these reports being undertaken at national level.' The main analytical observation to be drawn from this case points to how holding schools accountable for performance and serving the needs of parental consumers contradicted the liberal values behind the rival accountability model prioritising financial regulation and fairness.

This brings us to the second counter-narrative in which accountability was cast as a judicial system for advancing claims around the right to education. Katarina Tomaševski was once again an important voice here. In her book

Education Denied, she made a clear statement in favour of rights legislation as the conceptual foundation for holding authorities responsible for the right to education:

The human rights approach prioritizes law in holding governments accountable for their pledges, individually and collectively; indeed, it sees law as indispensable. Once a pledge becomes a human rights obligation, failure to attain agreed ends by specified means becomes a violation, to be redressed by compensating victims and making sure it does not happen again. (Tomaševski, 2003a: 101)

This was a clear example of a judicial framing of accountability, with Tomaševski appealing to the notion that government 'pledges' to guarantee the right to education were legally binding and that failure to deliver was a 'violation' to be brought before the courts. Her intention here was to balance rights with responsibilities and further enforce the right to education. This claim was supported by a legal line of argumentation drawing upon article 13 of the covenant on the right to education on how states had 'immediate obligations' (CESCR, 1999) to guarantee the right to education. The law scholar specialising in human rights Fons Coomans (2005: 254) took a similar line to Tomaševski, arguing that 'The state has to exercise due diligence to prevent violations of rights by private entities and thus remains ultimately responsible for their conduct.' These comments resonate with a perspective informed by theoretical concerns over humanisation as an undermined dynamic of the administrative system governing international education. The intention here was to elevate the educational rights of people and destabilise the business interests of providers that took centre stage in the accountability debate.

The discursive struggle of this judicial accountability counter-narrative was far from unproblematic. Pushing states to be answerable for their rights obligations through law sat uneasily with existing legal structures in the administration of global education. This was partly down to the tensions between trade laws set out by the World Trade Organisation and contrasting rights legislation. Making the distinction between these rival legal discourses

that fuelled contestation over whether education was a right or a tradable service, Katarina Tomaševski (2005b: 208) argued that although these perspectives seemed to 'co-exist in parallel', in fact they 'collide in reality'. Her successor as Special Rapporteur Vernor Muñoz Villalobos agreed when he made reference to the 'two conflicting and irreconcilable legal regimes for education' (UNHRC, 2010: 18). The assumption here was that, in legal terms education was viewed by the majority as tradable good or service, and the trade legislation necessary to regulate this backgrounded the enduring discursive struggles of humanists to ensure that the right to education was protected and enforced in law.

In spite of these tensions, the judicial framing of accountability was influential insofar that it persuaded like-minded institutions and drew concessions from others holding rival beliefs. It was plainly evident that this counter-narrative had penetrated the work of UN agencies. The 2002 GMR and UNICEF's *The State of the World's Children* report respectively echoed Tomaševski and the rights-based approach:

This approach places major responsibility for ensuring service delivery and monitoring on governments, underpinned by accountability to the national and international instruments of human rights. Such an approach in turn assumes that governments have translated international obligations into national legislation against which citizens have recourse. (UNESCO, 2002: 31)

[States] have to comply with the legal norms and standards enshrined in human rights instruments. Where they fail to do so, aggrieved rightsholders are entitled to institute proceedings for appropriate redress before a competent court. (UNICEF, 2003: 92)

These quotes show both agencies supporting the judicial accountability narrative by highlighting governmental 'responsibility' and state 'obligations' around the right to education, underscored by the assumption that 'rightsholders' were legally entitled to enforce their rights through 'courts'. The diffusion of judicial accountability and the concessions that this rival

narrative drew in the wider story were enabled by the powerful concept of enforceability. The World Bank economist Varun Gauri was an important voice here. He made a clear statement in favour of enforcing the right to education in parallel with the existing performance dimensions of accountability. In a working paper for the World Bank, Gauri (2003: 16) argued, 'A rights orientation strengthens the position of individuals to obtain information, avail themselves of service delivery options, organize local institutions and civil organizations, and to pursue judicial redress in domestic courts where necessary.' This quote shows Gauri emphasising the similarities between the rights-based and economic approaches to education in an attempt to make the Bank more publicly accountable for holding states responsible for guaranteeing the right to education. The social scientist Jonathan Fox and organisational behaviourist David Brown (1998: 13) observed the actions of those like Gauri, describing it as the work of an 'insider reformist' engineering a shift in the 'rules of engagement between public interest advocacy groups and the bureaucracy'. In his subsequent research advancing judicial enforcement of rights in poor countries co-authored with the political scientist and law specialist Daniel Brinks, Gauri (2008: 6) argued that 'Courts can help overcome political blockages, channel important information to political and bureaucratic actors, create spaces of deliberation and compromise between competing interests, and hold states accountable for incomplete commitments.' The main analytical observation to be drawn from this quotation is that the persuasiveness of legal arguments over the enforceability of the right to education in law caused a discursive deviation that made visible the judicial counter-narrative in struggles over the meaning of accountability.

In sum, this scene illustrated the rival beliefs that shaped accountability as a conflicted yet significant core part of the apparatus governing the liberal model of international education. The dominant framing that defined accountability in terms of achieving results and responsiveness to consumers, although not without its contradictions, was persuasive in supporting the proposition that marketisation was the driving force in the process. Counter-framings that exposed the deficiencies of this definition in terms of the incompatibility between performance measures and holding

providers accountable were flanked in the discourse by a set of rival narratives. While the performance framing was disputed in the stories actors told about accountability as fairness which emphasised curbing corruption and the regulation of public funds, the counter-narrative about holding states legally accountable for the right to education forced concessions from internal reformers in the corridors of powers. Having surveyed the three central pillars of the process, we turn next to the exterior and supporting components of the administrative system governing international education.

5.4 Scene IV: Governance by Measurement

This scene investigates conflicting beliefs behind measurement as a supporting factor of the administrative system governing global education. For, as this scene illustrates, beneath the harmonious veneer of monitoring progress on institutional goals and assessing standards, the increasing significance of statistics was disputed in terms of the types of data needed and the indicators best-suited to driving progress. Section one explores the ideational drivers behind institutional practices that advanced the use of data in education with reference to the cultural context that gave rise to them. Education Management Information Systems are presented as a case to illustrate the digital forms in which metrical norms were advanced in the discourse. Section two explores how ideological-based struggles formed a counter-narrative around critical framings of the rise of statistics in education governance. It surveys the 'death by numbers' counter-framing that sought to expose statistics as a neoliberal technology of power, followed by an analysis of how humanist actors portrayed data as a cloaking device that concealed discriminatory practices.

5.4.1 Good Stats, Right Results

This scene begins by establishing the cultural context within which powerful beliefs about data as an enabler of performance influenced the practices of the global institutions, governments and development agencies involved in the administration of international education. The uncritical faith of many in rigorous statistical analysis can be partly understood through the cultural context of how data became gradually accepted as a driver of success in professional sport. Perhaps the best-known example centres on how the number-crunching approach of manager Billy Bean enabled small-budget Oakland Athletics to compete with the goliaths of US Major League Baseball. In *Moneyball*, the book that popularised the art of winning through statistics, Michael Lewis (2003: 59) noted 'Everything from on-field strategies to player evaluation was better conducted by scientific investigation—hypotheses tested by analysis of historical statistical baseball data—than by reference to the collective wisdom of old baseball men.' A similar trend was observable in the English Premier League as less-exciting football clubs with

limited spending power turned to metrics. Describing the data-driven approach of former Bolton Wanderers manager Sam Allardyce, the sports writer Michael Cox (2017: 73) stated 'he provided his players with pre-season targets in terms of clean sheets and goals from each department of the side, and was an early adopter of ProZone, advanced statistical software that allowed him to analyse players and matches.' The attendant loss of faith in experience and observation that accompanied this belief in analytics as a means of getting results was by no means exclusive to professional sport.

If professional coaches were relying on in-game statistics to win matches at no extra cost, then it was only logical that public policymakers were placing similar faith in numbers. In Britain, the Blair government displayed a firm commitment to ramping up data collection to measure performance. As Chief Advisor to the Education Secretary during Blair's first term as Prime Minister, Michael Barber was a powerful advocate of the scientific method in the public reforms of New Labour. An innovator in the Prime Minister's Delivery Unit, Barber devised the science of results-driven public system reform he referred to as 'deliverology', an approach Barber fiercely promoted in his later post as education expert at the consultancy firm McKinsey & Co. In his book presenting a guide to deliverology for educational leaders, Barber stressed:

Knowledge of past and present is critically important for understanding what your system needs in order to move forward towards its aspiration. In this module, you will learn to locate the data that is most indicative of performance against your aspiration and to organise and analyse this data to identify patterns on performance. (Barber, Moffit and Kihn, 2011: 46)

This quote resonates strongly with the principles of managerialism that prioritised explicit standards and measures of 'performance', meaning that indicators of success were to be expressed through quantitative data. In the US, this perspective was shared by key decisionmakers behind major education reforms. Data formed a major pillar of the Obama

administration's reform strategy through the Race to the Top initiative which promised states a share of the \$4.35 billion fund in return for compliance with analytic procedures. The US Department of Education (2009) argued in favour of 'Building data systems that measure student growth and success, and inform teachers and principals about how they can improve instruction.' This belief in data as the key to successful public reform across in the US was legitimated by the authority of the economist and public policy scholar Eric Hanushek (1996: 27) who asserted that 'considerably more attention must be given to the direct measurement of student skills and school performance.' This perspective was further supported by public policy think tanks such as the American Enterprise Institute. A report for the Institute by Frederick Hess and Bethany Little (2015: 2) argued that 'The federal government can and should apply "moneyball" principles to its own decision making to make federal programs more effective and efficient'. The assumption here was that 'moneyball' precepts were synonymous with the market principles of efficiency and performativity that stressed the clear definition of targets and the analysis of data to effectively monitor results.

The importance of data to the system governing international education was evident in the practices of institutions, commentators and development agencies. One practical example was the rise of international assessment surveys which included, among others, the Programme for International Student Assessment (PISA) survey. Hired by the OECD for its Centre for Educational Research and Innovation, the statistician and mathematician Andreas Schleicher was the project manager and main developer of PISA during the 1990s. In the year of its launch, a flagship report by Schleicher (2000: 5) noted that 'PISA represents a new commitment by the governments of OECD countries to monitor the outcomes of education systems in terms of student achievement on a regular basis.' In an article celebrating his work as a triumph of data over theory and ideology for *The Atlantic*, the journalist Amanda Ripley (2011) described Schleicher as 'the world's schoolmaster'. The piece went on to quote Schleicher's catchphrase: 'Without data, you are just another person with an opinion' (Ripley, 2011). These quotes demonstrate how the use of data in global education was legitimated through the scientific rationalisation of PISA. Another practice

was the prioritisation of timebound institutional targets, as evident in the reaffirmation of the EFA goals at the 2000 World Education Forum. Associated demands for data to assess whether or not signatories were on track brought about the creation of the EFA Development Index, an instrument composed of multiple indicators to measure progress towards quantifiable educational goals concerning quality and accessibility. In support of measurement tools, the development economist Christopher Colclough (2005: 109) noted 'There is an urgent need to improve the quality and availability of a wide range of international data, particularly that covering financial and process parameters, if more effective monitoring is to be secured.' Stressing its commitment to meeting the EFA targets, DfID (2001: 6) agreed, noting that 'Targets also need to be grounded in reality. For this, we should not underestimate the value of good statistics [...] Much work is needed to improve the collection of reliable and comparable data, and to strengthen local statistical capacity.' In its 2005 Education Strategy, USAID (2005: 4) made similar points, arguing that 'The lack of reliable data on various aspects of the system's performance—from financial flows to enrollment and completion ratios—produces waste and inefficiency.' These quotes sought to frame educational statistics as vital not just for driving performance but also for achieving targets in a cost-effective manner. The assumption here was that educational objectives were *measurable*, echoing the free-market managerial logic of the consultant George Doran (1981) and his well-known SMART acronym (Specific, Measurable, Actionable, Realistic, and Time-related), thus underscoring a commitment to the results-oriented principle of measuring performance.

A case illustrating the significance of this metrical-turn in international education is the emergence of Educational Management Information Systems (EMIS) during the period of study as part of a gradual shift towards digital era governance. The extent to which EMIS became accepted as a facilitator of good governance in education programmes and a tool for improving government capacity to monitor progress towards EFA goals was noticeable in the policy literature. Marking the halfway point between the reaffirmation in Dakar and the 2015 EFA deadline, the 2008 GMR noted 'In moving towards increased education quality as well as equal access,

management systems have had to become more integrated and require more detailed information on inputs, outputs and processes. This requires changes in organizational structures and cultures' (UNESCO, 2008: 101). This quote shows UNESCO making the claim that EMIS provided the digital means to process data and drive up standards of learning in poorer countries. Here once more we see language similar to that of the managerial discourse, this time explaining the functions of an information system. As the business scholar Kenneth Laudon and management consultant Jane Laudon described it:

Input captures or collects raw data from within the organization or from its external environment. Processing converts this raw input into a meaningful form. Output transfers the processed information to the people who will use it or to the activities for which it will be used. (Laudon and Laudon, 2012: 16)

The assumption here, underscored by managerial beliefs, was that 'input', 'output' and 'processing' were key activities providing the necessary information for organisations to make key decisions and analyse problems. That this functionality was of relevance to the digital governance of international education was supported in a report by the Inter-American Development Bank reviewing the status of EMIS in Latin America. In this report, the education consultant Thomas Cassidy (2006: 4) commended 'Efforts to improve the quality of the data and information available to describe education systems and support decision-making.' Similarly, the work of information systems consultants for UNESCO furthered the agency's adoption of EMIS into its monitoring procedures. In his report for UNESCO rationalising the importance of EMIS in tackling access and quality issues in education, the information systems consultant Charles Villanueva (2003: 4) pointed to problems in 'the quality of data and the management support system'. This perspective was shared in an EMIS training manual for UNESCO's Harare office produced by the systems expert Tegegn Nuresu Wako (2003: 1) who argued 'the success in organising information systems for the development of education lies in the use of information for development.' These comments clearly employed a cautionary tale to

legitimate the use of EMIS with reference to the hardship of retarded development that awaited those who failed to adopt these systems. Having explored how the interdiscursivity of management consultancy thinking on analytics and information systems shaped the governance of international education, the next section surveys the critical perspectives that discursively resisted measurement imperatives.

5.4.2 The Tyranny of Numbers and Statistical Camouflage

Exploring the ideational drivers behind the counter-narratives that resisted this drive for performance measurement further exposes cleavages in the administrative system governing international education. These discursive fault lines were highlighted through arguments that both critics of neoliberalism and advocates of the rights-based approach deployed against the role analytics played in supporting the liberal model.

Actors critical of neoliberalism struggled to challenge the powerful norm of improving performance through statistics through a rival 'death by numbers' narrative. One strand of this counter-narrative took a philosophical perspective against metrics. The educational theorist Gert Biesta was the most important voice here. He made a clear statement problematising the notion that education decision-making could be based only on factual information and not on values. Biesta (2010: 12-13) observed the views of the philosopher David Hume in contrasting normativity with fact and its relevance to education, arguing that 'if we wish to say something about the direction of education we always need to complement factual information with views about what is considered to be desirable.' What Biesta seems to have been trying to convey was that statistics did not guarantee objective decision-making and policy choices because even the most rigorous of quantitative analysis could never be value-free. Biesta (2010: 13) went on to doubt the validity of statistical analysis, questioning 'whether we are indeed measuring what we value, or whether we are just measuring what we can easily measure and thus end up valuing what we (can) measure.' These quotes show Biesta advocating a re-examination of the philosophy of measurement that had evidently come to dominate the policy and practice of international education. His comments framed the influence of metrics as

the imposition of positivism on education research in an appeal to break with the powerful notion that improving the effectiveness of school systems was dependent purely on statistical data. These arguments resonate when viewed from a perspective informed by concerns over the corporatist preoccupation with results, in particular the lengths elites would go to in order to provide evidence of raised performance levels. Such claims hark back to earlier concerns over the applicability of business practices to public administration. For example, in an article from *The Independent* discussing the implications of the Cadbury report, the journalist Roger Trapp (1994) argued that 'With the focus on performance measurement comes the predictable temptation to concentrate on the easier targets.' The assumption here was that the entrenchment of measurement as a mechanism of governance rooted in economic liberalism threatened the integrity of public sector principles guiding the social provision of education and health services.

Adding to this strand of the counter-narrative was a more sinister framing developed through the empirical work of critical academics working in education. From this perspective, the 'metricisation' of education formed part of a broader trend in public policy that the author and journalist David Boyle (2001) termed 'the tyranny of numbers'. Contributing to this was the argument that monitoring represented a form of modern-day surveillance. The educational sociologist Jennifer Ozga was an important protagonist here. Concerned about the statistical outputs of assessment surveys such as PISA, Ozga (2008: 264) defined test data as 'a resource through which surveillance can be exercised'. Sharing similar concerns over the controlling effects of monitoring on education in England, the educationist Stephen Ball (2010b: 165) worried about the role of data in supporting 'a hierarchy of continuous and functional surveillance'. These comments used a *topos* of abuse to discursively resist the expansion of data in education on the basis of the authority-effect it created between principal investigators and their human subjects. A second and related aspect of this framing flowed from counter-arguments claiming that measurement constituted a mechanism of wider social control. This returns us to Ozga (2011: 7), who argued that 'data are a powerful resource that link new forms of governance preoccupied

with the measurement and improvement of performance to the constitution of society as a governable domain.’ In her study into national exam data in Russia, the educationist Nelli Piattoeva (2015: 329) made similar points, arguing that ‘numbers initiate and serve as connecting devices in the relations of power. They link diverse actors, and momentarily fix their roles as those who govern and those who are governed.’ These quotes sought to frame educational data as a tool of manipulation in a fashion that appeals to Foucault’s analysis of the art of governance. In supporting this line, both Ozga and Piattoeva give attention to writings on governmentality by the philosopher Ian Hacking (1991: 181) who argued ‘the collection of statistics has created, at the least, a great bureaucratic machinery. It may think of itself as providing only information, but it is itself part of the technology of power in a modern state.’ The main analytical observation to be drawn here is that these arguments address theoretical concerns over the support that measurement imperatives enjoyed in the governance of international education, and the commercial hallmarks of economic liberalism that this tendency bore. This discursive challenge to metrics as tools of surveillance and social manipulation reflected tensions over the market-based monitoring principles that critics believed were driving the technologies of the dominant neoliberal state.

The second counter-narrative that discursively resisted the dominant notion of data as a driver of results addressed humanist concerns over the types of indicators to be valued in determining progress. Key here were efforts to direct measurement towards more granulated data and procedures that monitored discrimination as well as results. Katarina Tomaševski was once again an important voice here, addressing issues of developing robust rights-based indicators and the use of data to serve human needs. In the fourth report in her series of Right to Education Primers, Tomaševski argued:

Discrimination remains unrecorded in international education statistics, which creates a vicious circle: Discrimination is invisible and one can pretend that it not exist because it is officially unrecorded; because there is no quantitative data, anybody trying to

prove that discrimination is taking place is due to fail due to the absence of data. It is impossible to effectively oppose discrimination without exposing it first. (Tomaševski, 2001a: 27)

This report represented data as a tool to serve education as a human right with which to 'expose' forms of 'discrimination' concealed in official 'statistics'. In her subsequent annual report as Special Rapporteur, Tomaševski followed this up by arguing that 'Statistical averages camouflage gender, racial, ethnic, linguistic or religious fault-lines, which are crucial from the human rights perspective' (UNCHR, 2002: 12). After taking over as Special Rapporteur, Vernor Muñoz Villalobos echoed Tomaševski's comments, making reference to 'a veritable paradox, given the lack or limited development of qualitative indicators capable of showing the nature and incidence of the specific obstacles that produce and promote exclusion, discrimination and denial' (UNCHR, 2006: 8). These reports clearly employ lines of argumentation around justice by pointing out the contradiction that sophisticated data used in official statistics to measure performance failed to detect acts of discrimination at play in international education. In supporting this line, Tomaševski and Muñoz Villalobos saluted the general comments on article 13 of the right to education by the UN CESCR (1999): 'Educational data should be disaggregated by the prohibited grounds of discrimination.' Here we see this framing being supported by a *topos* of law which recalled article 13 of the covenant to argue that statistical averages ought to be more granulated in order to detect forms of prejudice that perpetually blighted the education of the poor and disadvantaged.

If statistical data could be used to conceal discrimination in education, then it could be reconfigured to serve the right to education. This was the view of Katarina Tomaševski (2005b: 224) who noted that this oversight of discrimination could be remedied by 'translating human rights into the languages of economics and statistics'. This argument was performative in that it directed the discursive struggle to shape the EFA goal monitoring literature by working anti-discrimination indicators into official measurement tools. A key example concerned Tomaševski's insurgent efforts to incorporate elements of the right to education into the EFA

Development Index. The index was composed of indicators to assess what were considered to be the four most quantifiable goals, namely UPE, adult literacy, gender parity and education quality. Highlighting school fees as a major barrier to achieving the goal of UPE in her background paper for the 2003/4 GMR, Tomaševski (2003b: 21) argued that 'Economic exclusion, through school fees, compounds discrimination.' This quote shows Tomaševski making the claim that charging school fees interfered with the right to education by making primary education economically less accessible to the poor. The discursive effect of this struggle was evident insofar as school fees featured heavily throughout the 2003/4 GMR. This was clearly observable in relation to the EFA Development Index, particularly the net enrolment ratio which served as a proxy measure for the UPE goal. The GMR, recognising the potential of controversial variables such as fees to affect progress on the targets, noted that the Index 'provides an opportunity to investigate the extent to which progress towards EFA is associated with factors that may be a function of policy choice' (UNESCO, 2003b: 192). The report went on to note that 'The actual incidence of school fees has a negative impact on [the index], as expected' (UNESCO, 2003b: 193). A retrospective acknowledgement of the extent to which Tomaševski's discursive intervention was performative became evident a decade later in the EFA monitoring literature. The 2012 GMR noted 'Abolishing formal school fees has been a fundamental step towards realizing UPE' (UNESCO, 2012: 4). The main analytical observation to be drawn here is that advocates of the right to education were forced to make concessions over the power of statistics and associated underlying market-based beliefs. Humanist actors, whilst worried by the tendencies of metrics to conceal injustices, were restricted to the minimal gains they could make in shaping indicators around codified human rights norms.

To summarise, governance through measurement was a contested scene in the discursive construction of the administrative system overseeing international education. The dominant narrative driving the commitment to metrics, namely that statistics were the most effective tool for evaluating educational outcomes, reflected an overarching commitment to the commercial principles of improving performance and staying within budget.

The case of EMIS illustrated how the managerial concerns prioritising the measurement of progress had continued into the era of digital governance. This powerful narrative was met with resistance from beliefs that clashed with the use of analytics to advance the marketisation of education. While some opponents counter-framed metrics as surveillance tools and as apparatus supplementing the broader technologies of power wielded by the neoliberal state, others re-cast statistics as an instrument capable of numerically concealing entrenched forms of social prejudice. Having surveyed these tensions behind measurement as an ancillary part of the process, we turn next to the policy-informing evidence generated through the data.

5.5 Scene V: Evidence-based Policy

This scene explores the conflicting beliefs behind the use of empirical evidence to guide policy in international education, in particular research findings that functioned as vectors for PPP advocacy. Section one provides background on evidence-based approaches in the policy strategies of Western governments and international organisations before surveying conflicting perspectives over its application to PPPs. Section two presents a country case study into Pakistan as a laboratory for education reforms and how its experience was framed differently to promote or deny Pakistan as a role model for other low-income countries to follow. The analysis in this scene seeks to answer questions concerning the precise origin of the evidence used to justify introducing PPPs in poorer nations. In providing these answers, this case study illustrates the lengths key policy actors went to when they generalised from individual studies and also reveals the tensions behind debates over the conclusiveness of the evidence.

5.5.1 Scientific Evidence Driving Educational Innovation

Central to the rise of the evidence-based approach to policymaking in the international education discourse was the part Western governments and international organisations played in shifting decision-making from bureaucratic planning to proven models based on scientific research. In Britain, this practice was historically rooted in the link between medical trials and public health policy but rapidly diversified and spread to education through the managerial culture of the New Labour government. Outlining the UK reform model, the White Paper *Schools: achieving success* noted 'Clear targets have been established and schools and teachers have better evidence available to enable them to evaluate their performance and are increasingly ready to challenge themselves to improve' (DfES, 2001: 8). In the US, the Race to the Top programme took a similar line, noting that 'States will offer models for others to follow and will spread the best reform ideas across their States, and across the country' (U.S. Department of Education, 2009). These quotes show a clear commitment on the part of both education departments to developing, adopting and disseminating best practice in educational policies and methods. Similar messaging was also

observable in the institutional literature. Stressing the importance of knowledge in education systems, the OECD (2004: 41) stated 'scientific advance has a disputed role as an engine of educational innovation. Some of those currently involved with educational improvement are putting increased emphasis on implementing in practice those strategies that have been shown through formal evidence to work.' The World Bank (2003b: 1) made similar points, noting that 'Societies should learn from their innovations by systematically evaluating and disseminating information about what works and what doesn't. Only then can the innovations be scaled up to improve the lives of poor people around the world.' These institutional reports authorised the evidence-based strategy by further framing the spread of best practice through scientific findings as sources of 'innovation' in a cutting-edge and high-performance system.

From the analysis, a key application in the turn towards evidence-based policy concerned the way this approach was used to disseminate best-practice around PPPs in international education. Based at the World Bank's Human Development Network on Education before moving to the Harvard Graduate School of Education in 2011, the development economist Felipe Barrera-Osorio was an important actor here. He made a clear statement in favour of promoting partnership arrangements to poorer countries based on scientific evidence from select studies. On his academic profile Barrera-Osorio (2014) stated his research objectives: 'To formulate clear hypotheses about why a policy may work, create an intervention in conjunction with a government that can test the idea, measure and evaluate the impacts of the intervention, and, if successful, scale up the intervention.' This quote shows Barrera-Osorio making a clear commitment towards evidence-based strategies with reference to taking a successful policy 'intervention' from one setting with the express intention to 'scale up' and replicate it in other contexts. The Bank's publication *The Role and Impact of Public-Private Partnerships in Education* co-authored by Barrera-Osorio was notable in its application of this research interest. The report stated 'existing evidence from around the world shows that the correlation between private provision of education and indicators of education quality is positive, which suggests that the private sector can deliver high-quality

education at a low cost,' before concluding that 'more rigorous evidence is needed' (Patrinos, Barrera-Osorio and Guáqueta, 2009: 5-6). These quotes resonate strongly with a perspective informed by pro-market aspects of economic liberalism in that Barrera-Osorio authorised using evidence of proven private sector management tools to enhance public education in poor countries.

Running counter to the legitimating effect of these endorsements from institutions and policy entrepreneurs, ideational tensions were observable in the discourse surrounding the use of scientific evidence to promote PPPs. The education policy scholar Christopher Lubienski (2009: 184) was critical of this tendency to scale up PPPs from single interventions, arguing that 'the strategy of making consensus claims based on a limited body of research appears to have been rather successful from an advocacy perspective.' The education sociologist Antoni Verger (2016: 155) also had a sceptical take on this with the World Bank as a focal point of concern, arguing that 'in its promotion of the privatization agenda, the World Bank creates a virtuous circle between policy, research, and evidence.' Verger (2016: 154) concluded that this had created an 'echo-chamber effect in the use of research'. We can observe an anti-privatisation framing here driven by the belief that it was an ideologically motivated preference for private sector involvement in education driving PPPs rather than rigorous scientific evidence. These criticisms echoed those targeted at evidence-based strategies associated with New Labour UK education reforms. The public policy academic Kevin Farnsworth (2010: 60) argued 'If we consider the weight of evidence, education policy appears not to have been driven by "what works", but rather to have been driven by an almost dogmatic approach that has consistently overvalued the contribution of the private sector.' This quote shows Farnsworth setting out the counter-framing of evidence-based policy as a neoliberal cloaking device with which to further reform public education according to market values. As we shall see in the case that follows, claims of insufficient and minimal supporting evidence of PPP effectiveness advanced by critics of this strategy were prominent in the counter-framings, and so too was the presentation of contradictory research findings.

5.5.2 Pakistan, Education Laboratory

Evidence of Pakistan's experiments into private sector involvement in education played a powerful role in the discursive attempts of reformers to persuade others of the relative merits of PPPs. Pakistan was chosen because of its prominence in the literature as an example of best-practice for other low-income countries to follow. Admittedly, the addition of other country cases, particularly the experience of Colombia which featured noticeably in the corpus, could have been added to broaden the geographical coverage of proof that this discursive and policy practice was widespread and allowed for comparisons. But the decision to provide a more detailed single country case and the limitations of space determined that the focus remain exclusively on Pakistan. In this case, educational innovations in the provinces of Sindh and Punjab were the most discussed in the literature. The main state-established mechanisms to promote PPPs in these provinces were two semi-autonomous statutory bodies: the Sindh Education Foundation and the Punjab Education Foundation. Responsible for designing and administering PPPs in the region since 1992, Sindh Education Foundation received support from the Sindh provincial government. The Promoting Low-Cost Private Schooling in Rural Sindh initiative launched under the Sindh Education Reform Programme in 2008 became a specific focus of investigations assessing the effects of reforms. The Punjab Education foundation was established in 1991 with the mission of promoting quality education through PPPs in Punjab, the region which appeared to receive the most attention in the literature on reforms in Pakistan. The Foundation Assisted Schools programme in Punjab was a major initiative introduced by the Punjab Education Foundation in 2005 to advance affordable private education in the province with the aim of improving access to schooling. This and other Foundation-led programs received external assistance from the World Bank and DfID in the form of financial and technical support.

The persuasiveness of the claims that Pakistan had something to teach other poor countries about education reform was observable in the media. Several articles in *The Economist* supported this claim with one declaring

Pakistan 'the new standard-bearer for market-based education reform' (The Economist, 2015). A later article powerfully noted 'the results are promising—and they hold lessons for reformers in other countries,' adding that PPPs could 'improve children's results while costing the state less than running schools itself' (The Economist, 2018). The latter article employed similar language to that of policy entrepreneurs which informed DfID and World Bank education policy by generating evidence that partnerships raised educational performance. Firstly, the text quoted the Michael Barber who served as DfID's Special Representative on Education for Pakistan and coordinated education reforms in Punjab on behalf of major donors through the Punjab Schools Reform Roadmap. In his essay reviewing progress on the roadmap for the neoliberal-leaning think tank Reform, Barber (2013: 10) regaled the epistemic community with a 'story of redemption for Pakistan'. Highlighting the successes of PPPs in Punjab, his essay stated:

On a conservative estimate, there are approaching one and a half million extra children enrolled in school. In addition, student attendance daily is now over 90 per cent, 81,000 new teachers have been hired on merit and more than 35,000 more teachers are present at school every day than two years ago. (Barber, 2013: 13)

This quote shows Barber employing a *topos* of numbers to prove that market-based reforms had improved school accessibility in Punjab while tacitly underscoring his science of 'deliverology'. The 2018 article from *The Economist* also intertextualised similar results from a World Bank study led by Felipe Barrera-Osorio into the achievements of PPPs in Sindh province. Evaluating the short-term impact of contracting out in rural areas, Barrera-Osorio argued:

It increased school enrollment for children aged 6–10, the program's stated target age group, by 30 percentage points, and that for children aged 11–17 by 12 percentage points. The program also raised total test scores by 0.63 standard deviations. (Barrera-Osorio *et al.*, 2017: 2)

Like Barber, Barrera-Osorio also used numerical forms of rhetoric to underscore the case for PPPs in Sindh as an exemplar in improving access and learning outcomes. The main analytical observation to be drawn here is that the research of influential policy entrepreneurs confirming the success of PPPs in Pakistan had a legitimating effect in the framing of these reforms as lessons to be learned from by other low-income countries.

The less triumphant tones of academics investigating the impact of education PPPs in the country generated a counter-framing to the notion that Pakistan was a reform role-model. The economist Tahir Andrabi who took a leading role in the Learning and Educational Achievements in Punjab Schools (LEAP) project, an independent data collection exercise designed carried out between 2003 and 2007, was an important critical voice here. A report outlining the findings of the primary round of surveys on LEAPS noted 'Private schooling alone, however, cannot be the solution. Access to private schools is not universal. Private schools choose to locate in richer villages and richer settlements within villages, limiting access for poor households' (Andrabi *et al.*, 2008: ii). This quote shows Andrabi making that claim that there were major equity concerns over public sector involvement in the provision of education in Punjab. The development studies scholar Masooda Bano (2007: 19) made similar points in her background paper for the 2009 GMR, arguing that 'Over emphasis on private provision is likely to lead to lack of access or access to very low quality schooling among the poor.' These contradictory accounts of how PPPs were struggling to address the challenges of access, quality and equity of schooling in Pakistan were performative in that they cast doubt over how conflicting data was used to exemplify best-practice. Concessions to this effect were voiced by the former-World Bank economist turned-academic and member of the LEAPS team Jishnu Das who questioned the conclusiveness of Barber's claims over the success of reforms in Punjab. In an entry for the World Bank blog, Das (2013) argued 'the lack of credible public data and the lack of third-party evaluations of the program make it difficult to go to bat for the deliverologists at this time.' The international education academic Momina Afridi also had a sceptical take on the use of evidence from reform programmes in Punjab. In her research report for Oxfam, Afridi (2018: 4)

argued 'The World Bank has promoted the initiative as a success to be replicated by other countries, citing evaluations that find improved test scores and expanded enrolment.' These quotes sought to frame evidence of the success of market-based reforms in Pakistan as an inevitable consequence of the ideological preferences of reformers. Their arguments resonate strongly with critical perspectives on the marketisation of education which, underscored by anti-neoliberal values, believed that advancing market forces in education undermined opportunities for the poor and disadvantaged.

In sum, this scene has demonstrated that hidden tensions behind evidence-based policy played a supporting yet important role in explaining how the liberal system governing international education was discursively constructed as a process. It has shown that although controversial, evidence-based strategies supported by the UK and US governments, the OECD and the World Bank were put to use in discussions over education reforms involving PPPs. The Pakistan case traced evidence used to claim the success of contracting arrangements in participating provinces back to the findings of key reformers, illustrating how these were used to promote examples as experiences to be followed by other low-income countries. This case also revealed how the contradictory findings discovered by rival actors added to the discursive resistance that sought to expose the weaknesses of this allegedly confirmative evidence-base. Conflicting evidence boosted the credibility of critics who believed PPPs were driven by an underlying neoliberal inclination towards marketisation rather than evidence of 'what works' to improve the livelihoods of the poor through education.

5.6 Act Summary

To conclude, this act explored the process that put the vision into practice by discursively analysing the key parts of the administrative system governing international education, thereby revealing embedded tensions and hidden contradictions. In a political sense, the process related to the vision because it answered questions about how hopes and aspirations were institutionalised. In a narrative sense it was the journey part of the quest in which our cast of actors, often working at cross-purposes, endured difficulties and negotiated obstacles in their pursuit for answers. The analysis has illustrated how the five scenes of this act were structured by a lower tier of theory organised around a binary debate over whether marketisation, the extremity aligned with economic liberalism, or the more critical pole of humanisation formed the key dynamic in the process. This underlying theoretical context played out in the narrative to reveal how concerns over inequality and injustice, underpinned by humanist and anti-neoliberal beliefs, struggled to weaken dominant commercial norms that prioritised efficiency, results and performance as priorities in the governance of international education.

As this act has shown, the administrative system overseeing the liberal education model was site of tension and dispute among institutions and individual actors whose values were underpinned by competing ideological positions. These opposing perspectives shaped individual narratives, decisions and subsequently their political actions. Fundamentally, cleavages occurred because actors clashed over the preferred governance mechanisms and techniques sponsored by economic liberalism. For instance, Katarina Tomaševski and fellow humanist-leaning actors fought valiantly, though often in vain, to discredit market values by convincing others that all parts of the process existed to serve the needs of people rather than profits or fiscal prudence. That said, critics of rights-based approaches would suggest that humanist positions often aligned with, rather than diverged from, commercial principles during this twenty-year period. Notwithstanding this controversy, the discursive conflict chiefly unfolded through the manner in which actors framed and prioritised aspects of

marketisation bound up with economic aspects of the liberal administrative system according to which binary pole they aligned with. Powerful actors such as DfID and the World Bank, for instance, rejected humanisation as the main driver of the processes governing education by representing VfM, PPPs and performativity as ultimate priorities. Framing this through arguments based on efficient use of public spending and aid effectiveness reflected a positive appreciation and unrestrained promotion of the commercialisation of schooling in poorer countries.

This act of the grand narrative highlighted several discursive shifts and progressions concealed in the data. Firstly, the process appeared to be a more significant part of the story than the vision. This was observable as the powerful framings around the purpose of education a social good struggled to influence the technologies governing international education. Rather, neoliberal-informed beliefs tended to prioritise smoothing provision on the inside of the liberal model in the understanding that this would insulate them from criticism levelled at the actual policies put in place. A second recognisable shift is associated with the broadening of humanist beliefs which arguably developed and strengthened support for the rights-based approach. Admittedly, support for governance approaches tied to economic elements of liberalism remained relatively intact compared with the erosion of economic aspirations for education witnessed in the vision act. Nevertheless, the discursive resistance offered up by Special Rapporteurs and their influence was observable in that nearly every dominant representation was challenged by a counter-framing that sought to advance claims over the right to education. A final progressive shift in this act concerns the importance of technology and how technological innovation was continually under negotiation in the process. For instance, the integration of management information systems in international education to inform decision-making provided a key example of how technology enabled managerial practices to shape the administrative mechanisms of governance. In the final act of the grand narrative, thinking behind the practical policy outcomes of this conflicted process and ideational factors influencing various evaluations of these will be investigated.

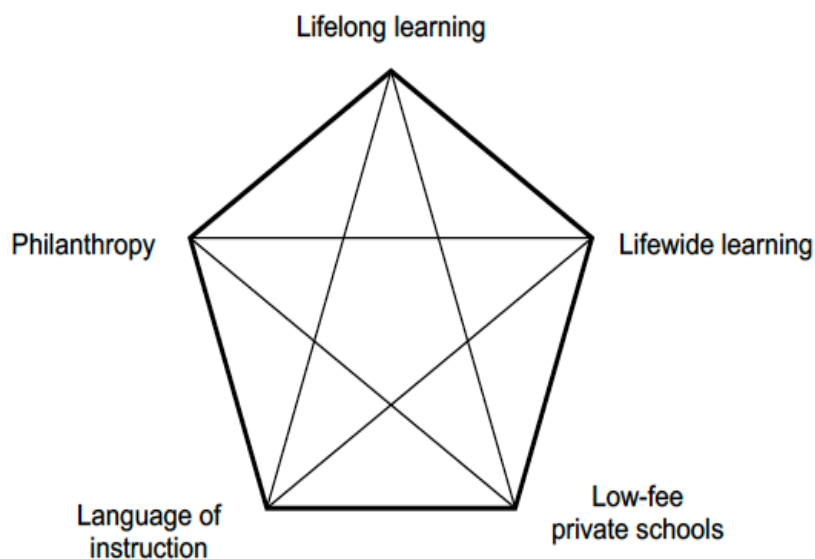
Act III: The Thinking Behind Policies in the Liberal Model of International Education: The Outcomes

The previous chapter explored the most significant parts of the process driving the administration system governing international education. It argued that the process was the second act in the discursive construction of the liberal education model as a grand narrative. This third and final act concludes the narrative by investigating the practical outcomes of this process. It is important to note that this act does not set out to evaluate the education policies implemented themselves. The act aims firstly to explore what politicians thought they were doing by making particular policy decisions, and secondly to analyse beliefs behind policy evaluations. In doing so, this act addresses the third research question: *What were the ideas behind the international education policies put into practice and the evaluations of policy outcomes?*

Essentially this act speaks to theoretical concerns over the economic aspects of the liberal model of education for development, in particular the growth path poorer nations were expected to follow as they transformed into modern and educated consumer societies. It argues that the outcomes act of the narrative was discursively constructed through five plot-driven scenes. Figure 10 presents these scenes in a pentagram. Informing these scenes was a theoretical dispute over the extent to which the outcomes were being driven by the notion that education constituted a commodity. This lower-level theory served the analysis in two ways. First, it facilitated the coding of topics and elicited keywords in the coding scheme (presented in Appendix 6). Secondly, it directed the analysis through a binary debate that shaped each scene according to whether learning was considered a commodity, the pole aligned with economic liberalism that desired an education industry of modern and tradable consumer goods and services, or a human right, the more critical pole that intended education as a right

to which all were equally entitled to fully enjoy. This theoretical context was accompanied by other political and economic contextual factors, the 2008 global financial crisis being a key example, thus situating the act in the understanding that these outcomes didn't take place in a vacuum.

Figure 10. The outcomes



Revealing the outcomes as a conflicted discursive terrain further adds weight to the overarching argument that the liberal education model, often presented as functional and harmoniously balanced, was a site of greater tension and contradiction than previously imagined. Unveiling tensions around the outcomes further establishes the necessary conditions to start resolving this policy puzzle. These frictions again derive in part from the divergent beliefs of actors influenced by their competing ideological affinities. Appendix 7 presents ideological leanings of the actors and institutions that shaped the outcomes according to the three tiers of the international education corpus. That said, the analysis remains empathetic to the notion that there will always be intended and unintended political outcomes no matter which ideology controlled the practical policies put in place. Similarly, it is understood that any effects of these policies would be bound to receive positive or negative evaluations regardless of the beliefs of the individual or organisation passing judgement.

Before outlining the chapter, it is also worth noting that this act does not deal specifically with pedagogical matters as these lay beyond the scope of this analysis and would be better off explored in a separate study. That is not to say they are unrelated to the outcomes, for some of the practical policies featured were informed by pedagogic innovation. Rather that, while aware of the influence of pedagogy on education policy, this act focuses mainly on the ideational drivers behind the broader policies implemented and their consequences. The first scene investigates lifelong learning, considered to be the most significant part of the outcomes given its status as a broad and ambiguous policy paradigm which proved a dominant and increasingly controversial area of debate among actors. Scene two separately explores the lifewide learning dimensions of the lifelong model as an interrelated and similarly important scene. Whereas lifelong learning focuses more on acquiring formal skills and knowledge throughout life, this scene concentrates on informal education particularly in the technological and digital domain. Scene three observes framings of low-fee private schools which emerged from the analysis as a source great discursive tension. Scene four explores the policy decisions and evaluations around language of instruction with a specific focus on the case of Rwanda. Scene five investigates the ideational factors that drove competing perspectives on the role of corporate philanthropy in international education. The act concludes with a summary of the outcomes and its core tensions followed by an overview of the key discursive shifts that emerged from the act.

6.1 Scene I: Lifelong Learning

This scene explores the ideational drivers behind the formulation and evaluation of policies around lifelong learning (LLL). Described as a 'language game' (Usher and Edwards, 2007: 49) in its own right, the scene explains how the slipperiness of LLL as a signifier allowed actors to assign multiple (and often conflicted) meanings to the term across political texts. It also explores the most prominent policy practices through which this contested paradigm emerged as a fundamental part of the outcomes. Section one sets LLL against the backdrop of the knowledge economy, a contextual factor connecting the outcomes with the vision act. Section two explores the representation of LLL in poorer countries as second chance education and contestation over this framing in the discourse. Section three presents a case study of Early-Childhood Education in South Africa to further illustrate how LLL was adapted to meet the education policy priorities of less prosperous countries.

6.1.1 LLL in the Knowledge Economy

This section explores LLL in its historical context and reveals the underlying tensions within the paradigm that problematised adoption in international education. Perhaps the earliest document of global importance on LLL was *Learning: The Treasure Within*, referred to as the Delors report, which reflected on the future of education systems in the changing global world and the role of education throughout the stages of life. In his preamble, the Chairman of the commission behind the report Jacques Delors (1996: 20) wrote 'Learning throughout life thus emerges as one of the keys to the twenty-first century. It goes beyond the traditional distinction between initial and continuing education. It meets the challenges posed by a rapidly changing world.' We can observe a liberal framing of LLL here, highlighting how these challenges were not just personal, but also of a professional nature and connected to the changing work environment. Key to this report were the principles of flexible learning through diverse forms of delivery openly available to all stages of life. Following its publication, UNESCO affiliates voiced concern that the suggestions and recommendations of the report had been variegated by thinking that prioritised the flexible reskilling

of workers to meet the changing needs of the labour market. In a study for the UNESCO Institute for Education, the Senior Research Specialist Carolyn Medel-Añonuevo (2001: 4) stated that 'the more dominant interpretation of [LLL] in the nineties was linked to retraining and learning new skills that would enable individuals to cope with the demands of the rapidly changing workplace.' The Assistant Director-General for Education for UNESCO Colin Power (1997: 188) agreed, noting that 'Whereas many contemporary reform agendas seem to be driven [...] by what market economists believe to be the ideal society, the report of the Commission is more closely aligned with the intellectual and humanistic ethical principles.' These quotes show UNESCO staff attempting to distance the definition of LLL supported in the Delors report from the dominant framing that emerged in the context of the knowledge economy.

International organisations were key protagonists when it came to shaping the meaning of LLL around the imperatives of economic rationalism with changing global labour markets as a priority. Produced by the European Commission (EC) as a result of a Europe-wide consultation, the *Memorandum on Lifelong Learning* drove this norm and laid out its universal plan for modernisation. The Memorandum stated 'The move towards [LLL] must accompany a successful transition to a knowledge-based economy and society' (EC, 2000: 3). The OECD (2000c: 18) endorsed this perspective, noting that 'The gathering momentum of globalisation and trade liberalisation, the ageing of populations and the changing nature of work all present an unprecedented challenge,' adding that this trend necessitated a 'more frequent renewal of knowledge and skills'. These quotes used a moral evaluation to legitimate LLL as a healthy and natural part of the transition to a knowledge economy. Indeed, a key analytical observation to be drawn out from these quotes is the noticeable return of the knowledge economy as an overt contextual factor in this act of the grand narrative. These comments echoed the words of the management scholar Peter Drucker (1969: 300) who noted 'When knowledge is applied to work, continuing education is needed, that is, the frequent return of the experienced and accomplished adult to formal learning.' In other words, as knowledge-based skills replaced experience in post-industrial societies, this would generate

the need for individuals to update their abilities to keep pace with such changes. Beyond the societies of prosperous nations, the residual influence of the knowledge economy was observable in the World Bank's literature which played a significant role in further legitimating LLL as a means of creating a modern workforce in poorer countries. Outlining the challenges, the Bank (2003a: 3) stated 'If developing countries do not promote [LLL] opportunities, the skills and technology gap between them and industrial countries will continue to grow.' This report clearly employed a cautionary tale to authorise the adoption of this economic definition of LLL in low-income nations by narrativising the hardships of non-conformity.

The powerful norm that developed around LLL as serving the inevitable needs of the knowledge economy was challenged by a counter-narrative comprised of two strands. The first took a distinctly humanist perspective, in the understanding that if the vocational notion of LLL was diversion from the Delors report then it was a complete betrayal of spirit of learning throughout life projected in earlier works commissioned by UNESCO. In the report *Learning to be*, commonly known as the Faure report, the authors offered the following recommendation:

Every individual must be in a position to keep learning throughout his life. The idea of lifelong education is the keystone of the learning society. The lifelong concept covers all aspects of education, embracing everything in it, with the whole being more than the sum of its parts. (Faure *et al.*, 1972: 181-182)

This quote shows the Faure Report making the claim that 'lifelong education' was about more than the continual renewal of vocational skills, but that it served the wider non-economic interests of the 'learning society'. In supporting this line, the UNESCO Institute of Education researcher Carolyn Medel-Añonuevo (2001: 4) harked back to the report, noting that lifelong education signified 'the more comprehensive and integrated goal of developing more humane individuals and communities in the face of rapid social change'. The former UNESCO Director Alexandra Draxler (2010: 34) also endorsed this perspective, stating that 'The humanistic and optimistic

view dominant in the sixties and seventies of a holistic education aimed at both individual and societal progress had ceded predominance to a more utilitarian view.’ These comments resonate when viewed from a perspective informed by the progressive realisation of education as a human right. They express concern over how the notion of LLL had become less about nurturing individuals and communities and more about updating skills for the knowledge economy. The educationist Katheryn Ecclestone, however, was critical of this humanist interpretation of LLL and the therapeutic turn in education it gave rise to with its over-emphasis on emotional literacy. A key danger of this, Ecclestone (2009: xiii) argued, concerned ‘a popular and political obsession with people’s emotional fragility’, adding that this was reflective of a ‘deeper cultural disillusionment with ideas about human potential, resilience, and capacity for autonomy’. These reservations refer us back to the shift away from inequality and towards inclusion seen in the vision act, in this case situating individuals as a site of reform in LLL and framing people as responsible for creating their own livelihoods.

This brings us to a second strand of resistance led by the education research of critical academics whose arguments sought to undermine the dominant norm around LLL and the wider neoliberal design for learning which it was thought to be part of. One argument questioned how the rhetoric of self-directed learning was shifting responsibility for learning throughout life onto individuals. Following this line, the educationists Carmel Borg and Peter Mayo (2003: 206) took issue with ‘an individualistic notion of learning that renders people responsible for their own education.’ The development scholar Les Levidow (2005: 159) made similar points, arguing that ‘Individual responsibility for learning becomes transformed into a duty to flexibly reskill oneself, according to ever changing imperatives of employability, as a means of social inclusion.’ The assumption here was that the individualistic aspects of learning came at the expense of the collective dimensions of knowledge, reflecting a neoliberal agenda that fixed the individual in the role of a knowledge consumer. A second line of argument cast doubt over the possibilities of LLL in the knowledge economy context. Worried about underlying structural economic issues, the educationist Frank Coffield argued:

[LLL] is being used to socialise workers to the escalating demands of employers, who use: 'empowerment' to disguise an intensification of workloads via increased delegation; 'employability' to make the historic retreat from the policy of full employment and periodic unemployment between jobs more acceptable; and 'flexibility' to cover a variety of strategies to reduce costs which increase job insecurity. (Coffield, 1999: 488)

Here Coffield sought to frame LLL as a form of social control by which concerns over flexible and employable stocks of labour were used by governments and businesses to divert attention away from unemployment, low-paid work and weak job security associated with short-term and temporary contracts. The educationists and outspoken critics of the knowledge economy D. W. Livingstone and David Guile took this argument further:

If the dominant tendency is for workers to have both unprecedented levels of formal knowledge/qualifications and increasingly recognized extensive embodied informal knowledge, and there is increasing evidence of underemployment and/or underutilization of their abilities, then surely the assumption of a major skill deficit as a significant barrier to further development of a knowledge economy is highly questionable. (Livingstone and Guile, 2012: xx)

This quote shows Livingstone and Guile making claiming that there was a clear contradiction between the perceived skill deficit and knowledge economy imperatives driving LLL on the one hand, and unprecedented levels of participation in adult education and continuing professional development that was taking place amid persistent structural economic challenges on the other. Having placed LLL in its wider context, we now turn to its discursive construction in poorer countries.

6.1.2 Second Chance Education

A key discursive strategy enabling the adoption of LLL in international education policy involved representing the paradigm as 'second chance' education. Literature from South-East Asia indicated the extent to which this framing had become an accepted interpretation of how LLL could be adapted to less prosperous settings. An article for the Thai newspaper *The Nation* (2009) stated that LLL 'should address the problem of skill deficit by providing a "second chance" for our adults to re-enter the education system.' A similar line was taken in Vietnam by the Deputy Director of the National Institute for Education Strategy and Curriculum Nguyen, Tien Hung (2007: 10) who noted '[LLL] creates/provides a second-chance education and training for those who could not complete their education by a certain age.' Here we can observe language similar to that used in the policy strategies of international organisations. The World Bank was the most important voice here, with second chance education forming a key part of its strategic direction for reform with youth and sustainability at the fore. As the 2007 WDR stressed 'Provide an effective system of second chances through targeted programs that give young people the hope and the incentive to catch up from bad luck—or bad choices' (World Bank, 2007: 2). The Bank's (2011: 4) 2020 Education Strategy saluted this: 'Second-chance and nonformal learning opportunities are thus essential to ensure that all youth can acquire skills for the labor market.' The Bank here displayed a commitment to broadening opportunities and developing the capabilities of young people through non-formal learning to catch up on what was missed, and thereby facilitating re-integration back into formal 'first chance' education to increase work readiness. The authority of the OECD (2010: 13) further legitimated this position, stating that 'Education policy should help address the skills deficits of children who have missed the opportunity to develop basic competencies early in life.' The 2010 EFA GMR, with its focus on reaching marginalised individuals, also endorsed this perspective arguing that 'Through second-chance programmes, young people who failed to complete primary education can acquire the skills and training needed to expand their livelihood choices' (UNESCO, 2010: 6). The assumption here was that, when it came to adopting LLL in poorer countries, employing

unutilised human resources to fill the skills gap and elevate economic activity was as, if not more important than achieving equity and advancing the aspirations for social inclusion.

A major source of dispute in the framing of LLL as second chance education related to the stages of life to which this opportunity to catch up most closely applied. Reflecting on the dominant demands for VfM driving the background process, the World Bank (2007: 62) stated that 'Remediation tends to be relatively costly for many of the transitions, which is why early attention to basic needs for younger children, as well as broadening opportunities for young people and helping them decide wisely, are essential.' The Bank (2007: 46) went on to note that 'These programs for second chances can be costly, but not as costly as remediation for adults.' Here the Bank displayed a commitment to earlier stages in the LLL cycle, a position it rationalised through bodies of scientific knowledge based on evidence from a selection of active labour market programmes. The most significant case was the Jóvenes literacy programmes, a series of state-supervised and civil society supported vocational training schemes implemented across Latin America aimed at preparing for out-of-school 16 to 29-year-olds for employment. Research from the Bank's Social Protection Unit led by Gordon Betcherman (2004: 36) noted that 'the program demonstrated positive and significant effects on employment and earnings,' adding that 'net gains are estimated to be substantial.' Another body of evidence rationalising this position was based on non-profit primary schools running in parallel to dysfunctional states. In this case it was the experience of the Bangladesh Rural Advancement Committee (BRAC), a south-south development NGO with operations in 13 countries across Asia and Africa, which runs an accelerated learning programme delivering a five-year primary curriculum within a four-year span. As one report by BRAC (2019) asserted: 'Our primary schools provide a second chance at education, addressing the needs of children who have dropped out from the mainstream education system.' In this quote BRAC clearly defined second chance education as centred on the primary level and basic education. Further legitimating the approach of BRAC, the international education policy experts Joseph Farrell and Ash Hartwell (2008: 26) argued that 'there

is ample evidence that alternative education programmes are able to reach underserved populations and regions cost-effectively and affordably.’ The main analytical observation to be drawn from both programmes was that they reflected the World Bank’s belief that the main thrust of second chance education was directed at young people catching up on basic education as a cost-effective means of improve the employability of disadvantaged youths.

Discursive resistance to the second chance representation of LLL emerged from the analysis in the form of a humanistic counter-framing denouncing it as ‘second best’ education. One line of argument questioned whether, even in emergency situations, second chance education provided an acceptable temporary substitute for formal primary schooling. In his speech, the UK Parliamentary Under-Secretary of State for International Development Nick Hurd (2016) argued ‘No child should be deprived of the basic life chances that education provides. Damage done in their formative years can never be undone.’ Here we see Hurd subtly echoing the humanist concerns of Katarina Tomaševski that second chance programmes did not conform to the right to education. As Tomaševski (2005a: 74) put it: ‘Children cannot control the aging process, hence their prioritised right to education in international human rights law; the damage of denying education while they are growing up is difficult, if not impossible, to remedy retroactively.’ What Tomaševski seems to have been trying to convey was that the timeliness of basic education meant that second chance programmes could not retrofit individuals with the foundational learning they should have gained as children. A second dispute highlighted the contradiction of how focusing on second chance education for young people forced policymakers into a trade-off that excluded other stages in the learning lifecycle. Critical of the how the EFA goals segmented LLL, the educationalist Rosa Torres wrote:

Focus on age contributes to losing sight of social learning organisations like the family and the community, and has institutionalised the false ‘option’ between children’s education and adult education, whereby children and adults have to compete for their right to education. (Torres, 2011: 42)

As Special Rapporteur, Katarina Tomaševski had previously employed similar language: 'If the right to education is limited to primary and/or the first stage of basic education only for children in a determined age range, adolescents and adults, or younger children, may be precluded from claiming their right to education' (UNCHR, 2002: 7). These comments resonate strongly with the rights-based approach to education, indicating that second chance education directed at exclusively at enabling younger people to 'catch up' denied the holistic notion of LLL supported by humanist beliefs.

Adding to this counter-framing of second chance education were arguments disputing the imposition of dominant Western LLL norms on poorer countries. Observing sceptical positions in this regard returns us to Rosa Torres (2011: 46) who argued that 'The [LLL] paradigm has so far had little impact in countries in the South. Many countries, especially in Africa and Asia, are still struggling with access and the completion of children's primary education and high adult illiteracy rates.' Similarly, the Senior Programme Specialist at UNESCO Sobhi Tawil (2013: 8) agreed on the difficulties of operationalising the paradigm 'particularly in lower-income countries where equitable access to relevant basic education remains a major challenge'. These misgivings spoke to more deeply rooted theoretical concerns in the literature that associated the export of LLL with wider liberal development plans to modernise low-income nations into consumer societies. Describing this forcefully, the adult literacy campaigner H.S. Bhola (1997: 215) argued that 'economistic models, wherein the modernization of the economy was of the essence, and human resources development (the instrument for training labour to give them new skills and new mentalities) have failed in the developing world'. The IR scholar Anja Jakobi echoed Bhola's remarks:

The idea of a knowledge society, which is in some sense nowadays a version of a modernization theory, has reinforced the idea that all countries are moving towards a common aim and that lifelong learning is a much needed tool for progress. (Jakobi, 2009: 160)

These comments resonate with critical perspectives on the stages of growth model embraced in economic liberalism insofar as there is suspicion over the educational implications of the linear path towards progress eulogised by 'modernization' theorists. From this perspective, second chance education as an adopted form of LLL could be perceived as a by-product of the social, economic and cultural conditions of the poorer settings in which they landed. At risk of being labelled as 'laggards' (Jakobi, 2009: 158) for failing to accept to the commanding Western LLL norm promoted in the dominant discourse, compliant adopters were arguably exposed to the incongruous forms in which LLL was repackaged by international organisations and foreign donors.

6.1.3 Early-childhood Education in South Africa

This section presents a case study on Early-childhood Education (ECE) in South Africa and explores the conflicting beliefs behind associated policies put in place. South Africa was chosen because it became recognised as a 'hard case' (Jakobi, 2012: 119) for the diffusion of LLL given the lack of resources available in the country. One notable contextual factor concerned the struggle for self-esteem, identity and respect facing uneducated youths in poor communities associated with gang membership. In his ethnographic study of a township in Cape Town, the development scholar Steffen Jensen (2006: 292) noted that 'Through the gang imaginaries the stereotypes of weak and coloured men can be deferred to those coloured men who are not part of gangs.' It was against this background of a crisis in self-respect and morale in the backstreets that ECE emerged as an increasingly accepted LLL norm in South Africa between 2000 and 2020.

A brief inspection of the play-based learning training programme for ECE practitioners developed by the Department for Basic Education in partnership with UNICEF and LEGO appears to confirm acceptance of ECE. Supporting this pedagogical innovation, an editorial for the *Pretoria News* (2017) noted 'If we are to succeed and help our learners to acquire both the aptitude and attitude of the Fourth Industrial Revolution (4IR), impacted by new technologies, policy makers and influencers are the first people who need to change.' This extract shows the South African media consenting to

play-based ECE as a symbol of modern education to equip early learners with the necessary self-confidence and skills to thrive in the '4IR'. This programme was in accordance with South Africa's broader National Integrated Early Childhood Development Policy (NIECDP) produced in collaboration with UNICEF. Official policy documents noted 'Early learning and development in the early years lay the foundations for LLL and contribute to the achievement of key outcomes for infants and young children' (Republic of South Africa, 2015: 43). This followed up on the government's Strategic Plan 2007-2011 which committed to 'increased provision of quality early childhood development programmes' (South African Department of Education, 2007: 4). The LEGO Foundation had been actively involved in advocacy work in South Africa since 2008 and successfully lobbied to include play in the country's early-childhood policy. A report by the LEGO Foundation (2015: 13) stated 'Play has a key role in establishing the vital early learning skills that underpin all other learning throughout our lives.' These comments, while providing background for the case study, resonate immediately with the context of global integration promoted in economic liberalism given the involvement of external actors, namely UNICEF and the LEGO, in shaping ECE in South Africa. Throughout the case, concerns over the uneven and commodifying effects of this interaction intersect with discursive accounts of how this newfound consent for ECE seemingly overplayed earlier antipathy towards the foreign LLL paradigm.

This welcoming of contemporary ECE policy was a departure from the negative reception received by prior LLL policy innovations in South Africa. Earlier scepticism targeted, among other official policy documents, the 2001 White Paper which asserted 'we expect to increase access to [Early Childhood Development] programmes, improve the quality of such programmes and provide South Africa's youngest citizens with a solid foundation for [LLL] and development in the 21st century' (South African Ministry of Education, 2001: 6). Here, we can see language similar to that of the first EFA goal which committed to 'expanding and improving comprehensive early childhood care and education' (UNESCO, 2000: 8). Reform sceptics such as the South African educationist John Aitchison

challenged this powerful form of persuasion around LLL. Referring to the White Paper and similar policy documents, Aitchison (2004: 528) argued 'the use of the language of [LLL] becomes self-delusional, a pretending that a radical agenda is still being pursued when it is not.' The education and development scholar Simon McGrath (2009: 41) made similar points, noting that 'the intrinsic and symbolic logics of a [LLL] system have been overwhelmed by institutional logic and political economy, resulting in a system that exists in name only.' Historically, such concerns over the practicality of LLL in South Africa in the post-Apartheid era can be traced back to the human resource theorist Andre Kraak. He was critical of LLL inclusion in education reforms aimed at vocational skilling in the 1990s led by the African National Congress and the Congress of South African Trade Unions. In an article for the *South African Labour Bulletin*, Kraak stated:

Advocates of [LLL] and a more export-oriented manufacturing sector rely heavily on the assumption that the South African economy has exhausted the economic benefits of Fordist methods of production and is now on the verge of a transition to post-Fordism. (Kraak, 1994: 36)

This quote resonates when viewed from a perspective informed by liberal modernisation beliefs, reflecting the notion that LLL was an external modernising force causing South Africa to leap beyond the 'Fordist' social and political order and transit prematurely to a post-industrial stage of mass consumption. For Kraak (1994: 37), LLL rhetoric ignored not only the particular stage of economic growth South Africa had reached, but also its complex social history of apartheid and the potential for inequalities to be inadvertently reproduced by 'racist forms of work organization' generated by such policy innovations.

In the intervening years between the 2001 White Paper and the 2015 adoption of NIECDP, consent for ECE policies foundational to LLL overshadowed unease over the impracticalities of accepting the vocational dimensions of the policy paradigm. This backgrounding of anxieties was shaped by a powerful discourse about neuroscience from which persuasive

arguments were recontextualised into the LLL literature on early-childhood. One argument based around the psychology of learning through play was particularly influential on the play-based pedagogy programme which shaped the NIECDP. In a report commissioned by the trade association Toy Industries of Europe, the educational psychology scholar David Whitebread (2012: 5) noted 'the crucial contribution of play in humans to our success as a highly adaptable species', adding that 'playfulness is strongly related to cognitive development and emotional well-being.' In these quotes we can observe here the scientific argumentation through which play crept into ECE decision-making in South Africa. This built upon a more central argument concerning timeliness which claimed that early-childhood was the key phase of neurological growth which legitimated the ECE elements of the Strategic Plan 2007-11. The child psychologist and senior advisor to UNICEF Patrice Engle was an important voice here, supporting ECE as a strategy to avoid the loss of development potential in disadvantaged children:

Interventions to promote early child development are cost-effective investments to ensure that children are prepared for educational and economic opportunities, thereby reducing disparities and achieving the Millennium Development Goals of reducing poverty and hunger and ensuring primary school completion for girls and boys. (Engle *et al.*, 2007: 239)

In this quote we can see Engle offering a variety of conflicting reasons for governments to invest in ECE, with the claim of it being 'cost-effective' connecting to neoliberal values, and the concerns over reducing 'disparities' and 'poverty' more closely associated with humanistic beliefs. This conflict was recontextualised in the founding principles underpinning the NIECDP, namely a combined commitment to 'cost-effectiveness' and 'a human rights-based approach to early childhood development' (Republic of South Africa, 2015: 50-51). On the one hand there was the efficiency argument influenced by the Nobel Prize-winning economist James Heckman (2008: 4) arguing that 'The longer society waits to intervene in the life cycle of a disadvantaged child, the more costly it is to remediate disadvantage.' On the other, the values behind the UN CRC (1989) which enshrined 'the

survival and development of the child'. Here we observe contradictory arguments at play in which beliefs over education as a commodity and as a human right were entangled in the literature informing ECE in South Africa.

Compelling though the arguments supporting ECE were, it was nevertheless perceived by policymakers in South Africa as a more practical and urgent social strategy for aligning with the global discourse on LLL. Returning to the IR scholar Anja Jakobi momentarily, she described South Africa's experience of adapting the meaning of LLL to meet its needs by focusing on early-childhood as typical of adoption in other parts of Sub-Saharan Africa. As Jakobi (2012: 128) noted 'While industrialized countries often mention the knowledge society, and strive for a competitive workforce with up-to-date skills in their concepts of lifelong learning, African concepts are far more focused on basic education.' In other words, rather than adopting the standard LLL concept of reskilling of labour to create a modern workforce, in South Africa contextual factors such as individual self-esteem and security issues combined with external discourses and outside collaborators to shape the adoption of LLL policies around early-childhood priorities.

To summarise this scene, LLL proved a pliable term that was adapted and evaluated by different actors according to varying underlying beliefs. The dominant interpretation of the policy paradigm based of building a flexible workforce to compete in the knowledge economy favoured by high-income post-industrial countries conflicted with two rival standpoints: holistic interpretations aligned with the origins of lifelong education favoured by humanists, and the disquiet over unemployment and the commodification of knowledge among critics of neoliberalism. Reframing LLL in poorer setting as second chance education was at odds with the values of rival actors. On the one hand it clashed with humanist concerns that perceived it as 'second best' learning and were apprehensive about age biases concealed in the framing. On the other, it caused a rift with actors who perceived LLL as a policy tool that complemented modernisation imperatives rooted in economic liberalism. As was revealed in the case study on ECE in South Africa, a major contradiction over LLL concerned how adoption was altered in poorer countries that were yet to reach a post-industrial stage, and how

it was shaped to meet local basic educational needs through cooperation with foreign partners.

6.2 Scene II: Lifewide Learning

With a focus on digital learning environments, this scene explores the conflicted beliefs behind lifewide learning (LWL). Section one investigates divergent representations of informal learning which unfolded against the background of the prominent technological subplot wherein actors sought to redefine international education in the digital age. Section two reveals the tensions behind the decisions and evaluations around the policy discourse through which LWL was diffused via digital environments in low-income countries.

6.2.1 Informal Learning and the Digital Divide

In more prosperous parts of the world the dominant discourse on LLL was supported by a powerful narrative about learning as a lifewide enterprise that transcended the boundaries of traditional learning institutions. There was a culturally mediated shift in the discourse during the period of study through the emergence of a powerful norm around the acquisition of skills and knowledge as an informal and leisurely activity. A key example of this norm was the widespread acceptance of the term 'edutainment', a soundbite which lost its critical edge in the discourse over time. Explaining the term in an article for *The New York Times*, the journalist Greg Beato (2015) noted 'edutainment combines aspects of education and entertainment into products and experiences that seek to improve learning by making it not just painless but also pleasurable'. The article went on to cite TED Talk lectures streamed online and brain-training video games as evidence of 'the academicization of leisure' (Beato, 2015). The emergence of this norm can be discursively traced to the reports of influential institutions that endorsed LWL. Detailing the implications of LWL, a well-cited report by the Swedish National Agency for Education noted 'a shift in responsibility for education and learning from the public to the private and civil spheres', adding that 'education monopolies are being dismantled and replaced by a diversity of learning environments, actors and principal organisers' (Skolverket, 2000: 9). The report went on to note that the lifewide concept of learning 'takes place in the world of societies, in the family and everyday reality' (Skolverket, 2000: 19). The OECD (2000a: 11)

made similar points, arguing that 'The school as a "house of knowledge" is increasingly facing competition from other knowledge sources, including information and entertainment and from enterprises that define themselves as knowledge producers and mediators.' These quotes sought to frame LWL as informal learning activities, the success of which was dependent on the ability and motivation of individuals to take advantage of learning opportunities, along with the innovation of new providers to develop marketable learning resources.

Far from a consensual norm, the powerful discourse on LWL was resisted by academics critical of this educational trend. The educationist Stephanie Allais was an important voice here. She made a clear statement against informal learning as a notion that undermined the acquisition of knowledge:

The neglect and in some cases abandonment of bodies of knowledge and subjects [...] means that education can be seen as a 'generic service', making it easier to treat it as a mere commodity to be delivered on the market by the most competitive provider [...] the idea that knowledge can be acquired anywhere, whether in education institutions or the course of everyday life, and more extreme ideas like 'deschooling', produce fantasies about learning unconstrained by institutions, and individuals free to choose from a wide range of learning possibilities. (Allais, 2014: xxii)

The main assumption here was that the acceptance of 'bodies of knowledge' gained informally as equivalent to those gained at formal institutions of learning amounted to education becoming reduced to a 'commodity' like any other on the 'market'. The academic specialists in LLL Robin Usher and Richard Edwards also had a sceptical take on informal learning. They argued that, 'Learning activities have become consumer goods in themselves, purchased as the result of choice within a market-place where learning products compete with those of leisure and entertainment,' concluding that 'the boundaries between leisure, entertainment and learning are increasingly blurred through forms of edutainment'. (Usher and Edwards, 2007: 30). This quote shows Usher and Richards making the claim that

'edutainment', a term later used uncritically in the media as illustrated above, was symbolic of the extent to which the commodification of education had gained widespread acceptance in the public consciousness of wealthy nations. If the diffusion of LWL in prosperous Western nations was controversial, then the international education literature indicated that its adoption in poorer parts of the world was arguably even more contentious.

Before surveying the conflicted framings of LWL, it is important to firstly note that the technological sub-plot was once again prominent in this act of the narrative. Informal learning in the digital age was dependent on the development of ITC competencies and the availability of technology. A report by the Overseas Development Institute on the digitalisation of Africa by its researchers Karishma Banga and Dirk Willem te Velde (2018: iii) noted 'To increase the development impact of digitalisation, it is crucial for African countries to develop complementary skills.' Historically, there was convergence around this thinking among international organisations in recognition of the associated risks of digital technology worsening global disparities. The OECD (2000b: 4) report *Learning to Bridge the Digital Divide* was an especially influential publication, pointing out gaps between technology and learning that defined the 'learning digital divide'. The report went on to argue that 'A major policy concern to be addressed is the role of developed countries – *the haves* – in helping to bridge the digital divide for the rest of the world, the *have-nots*' (OECD, 2000b: 17). The World Bank employed similar language. For example, the 2000/2001 WDR referred to 'Bridging the digital and knowledge divides, thus bringing technology and information to people throughout the world' (World Bank, 2000: vi). The 'digital divide' was intertextualised in a speech to the World Education Forum in 2000 by the UN Secretary-General Kofi Annan (2000), who warned 'A yawning digital divide exists between those who have access to new technology and those who have not.' This liberal convergence around informal learning through education technology is evident in the usage of 'digital divide' language. For the linguist Jonathan Chateris-Black, 'bridging' language was far from arbitrary. Rather it was illustrative of the construction metaphors commonly employed by elites to argue that their administration 'creates the circumstances in which people become more creative and

productive in their own lives,' adding that 'the positive evaluation that we place on acts of creation transfers to the agent that is responsible for this' (Chateris-Black, 2005: 122). Addressing the World Bank's use of this metaphor specifically in relation to international education, the educationist Amy Stambach (2006: 327) noted 'The bridge metaphor suggests a fast route over rough terrain and supports the idea of technology-assisted acceleration,' adding that 'the Bank itself builds this bridge, using digital technologies as its medium of construction.' The assumption here was that behind this 'bridge' metaphor lurked the belief that education technology and IT skills were essential factors if poorer countries were going to follow the linear path of modernisation towards a consumer society previously taken by wealthier advanced nations.

This powerful framing of narrowing the gaps in technology and learning between rich and poor nations was further legitimated in the discourse, but this did not go unchallenged. One way of rationalising policies promoting education technology was to emphasise the potential economic benefits to resource providers. In support of developing technological infrastructure and capability around distance learning in poorer countries, the Assistant Director-General for Education at UNESCO Colin Power (1997: 197) argued 'it is the possibility of outreach and economies of scales which is most immediately attractive.' Using a different discursive tactic, the UNDP (2001: 1) further legitimated digital learning in its 2001 Human Development Report: 'Without innovative public policy, these technologies could become a source of exclusion, not a tool of progress. The needs of poor people could remain neglected, new global risks left unmanaged.' This report clearly employed a narrative form of legitimation through a cautionary tale highlighting the potential hardships facing poorer nations that didn't conform with the policy advice. Another powerful form of legitimation used was the moral evaluation that learning and technology were naturally complementary factors to drive progress in poorer societies. In an independent report for McKinsey & Co, the technology consultant Kara Sprague (2014: 42) noted 'One of the primary remedies for a lack of language and digital literacy is a strong education system, either formal or informal, and sufficient resources to provide a supportive learning

environment.’ The educationist Rosa Torres (2011: 47) agreed, arguing that poorer countries needed to ‘combine all means and media available to make learning happen, through multimedia strategies.’ The education and technology scholar Neil Selwyn, however, was critical of this. Selwyn (2012: 120) argued that ‘high-tech digital “leapfrogging” agendas are perhaps an inappropriate and ultimately unhelpful approach to furthering the fortunes of low-income communities.’ This form of technological ‘leapfrogging’ refers to what the information systems scholar Robert Davison (2000: 2) described as ‘the implementation of a new and up-to-date technology in an application area in which at least the previous version of that technology has not been deployed.’ Returning to Stambach (2006: 327), who also had a sceptical take on implementing digital learning technology in poor societies, describing policies that exclusively prescribed digital approaches as ‘reminiscent of an older economic idea that the systematic application of science and technology will generate economic take off.’ These criticisms resonate firmly with theoretical concerns over the irregularities experienced by low-income countries on the liberal modernisation path. Specifically, they reflect anxieties that the demands of bridging the digital and knowledge divide could force poorer countries to skip and miss out on the benefits of traditional forms of technology capable of serving wider audiences of informal learners.

This brings us to a key counter-framing which further questioned the logic of informal learning through digital technology in low-income countries by stressing the benefits of analogue alternatives. Casting doubt on the practicalities of digital technology in poorer communities, the Special Rapporteur, Kishore Singh argued, ‘Reliable access to electricity to charge devices is often a problem in the developing world. Information and communications technologies can result in educational deprivation, particularly for the poor’ (UNHRC, 2016: 9). Singh clearly employed a *topos* of disadvantage here with reference to the veritable paradox that poorer societies lacked the stable supply of ‘electricity’ to power digital devices let alone learn on them. Key to the counter-framing was how the efficacy of digital technology to improve access and quality of education in poorer countries was arguably becoming eclipsed by older technologies, radio in

particular. Interactive Radio Instruction (IRI), originally developed in Nicaragua in the 1970s through a USAID funded programme led by Stanford University, was argued to boast proven educational outcomes compared to the mixed results of digital learning. For example, the 2015 GMR noted, 'In developing countries, computer resources remain greatly overstretched,' adding that 'radio is an enduring and successful example of technology use, in particular for children in isolated settings' (UNESCO, 2015a: 211). This GMR cited the results from several influential bodies of evidence to support its endorsement of radio. One study was the South Sudan IRI Project conducted by USAID. An evaluation report produced by the Management Systems International staff Stuart Leigh and Andrew Epstein (2012: 2) argued that '55,000' out-of-school youths were enrolled in the accelerated learning program using '180' programmes to deliver the primary school curriculum, in addition to '60' audio programmes which provided informal learning to adults on health and civic issues. Leigh and Epstein used the rhetoric of numbers to persuasively argue the accessibility benefits of IRI. The project appraisal concluded that it provided 'effective basic education support for out-of-school youth and also contributing to democratic participation and civic awareness among adults' (Leigh and Epstein, 2012: 50). Another study argued that the radio instruction had also improved learning outcomes among marginalised groups in Latin America and South Asia. Education policy analysts Jennifer Ho and Hetal Thukral (2009: 12) noted that in these regions 'learners in rural areas continue to benefit from IRI programming'. These comments again reflect theoretical concerns over distortions in the liberal modernisation pathway. In this case, the relevance of digital learning in lower-income countries and insistence on the continual deployment of online technologies was questionable given that many poorer communities had yet to exploit the true potential of radio.

6.2.2 MOOCs and the African Virtual University

This section explores differing ideas behind the broader phenomenon of Massive Open Online Courses (MOOCs) and the experience the African Virtual University (AVU) as interrelated cases of LWL diffusion through technology in poorer countries. The emphatic rise of 'MOOCs' as a global buzzword in higher education was emblematic of how informal learning in

the digital environment had been established as a norm. Accreditation was a prominent contextual issue in the media coverage on MOOCs by actors seeking to raise the credibility of this informal mode of learning. In an article for the *Financial Times*, the Managing Director of the global edu-business Pearson VUE, Matthew Poyiadgi (2014) noted 'The final part of increasing credibility, and in monetising MOOCs, is by maximising the use and sharing of a MOOC credential.' This quote shows Poyiadgi framing MOOCs as a high quality and plausible alternative to formal higher education by endorsing digital badges as an equivalent to credits on an official transcript. The Special Rapporteur Kishore Singh, however, was critical of this. He argued that MOOC certificates served as 'an inferior form of educational outcome and an inadequate indication of the quality of learning' (UNHRC, 2016: 11). Accreditation aside, the credibility of MOOCs had been further challenged in the media by sceptics. Commenting on a study into MOOC completion rates that surveyed 103 professors in *The Chronicle of Higher*, the reporter Steve Kolowich (2013) stated that 'The average pass rate was 7.5 percent.' The prospects of MOOCs for delivering high quality teaching to ambitious students in low-income countries was challenged in an article for *The Guardian*, by the journalist Louise Tickle (2014) who argued that 'UK academic institutions are patronising developing countries by exporting small snippets of elitist education.' This quote from Tickle resonates strongly with theoretical concerns over the commodification of higher education, especially suspicions that MOOCs were reproducing conditions by which poorer societies were forced to evolve in a manner that was educationally inferior.

The controversy over MOOCs in the Western media echoed broader institutional debates over Open Education Resources (OER), in other words digital learning materials freely accessible to informal learners, students in formal education and educators. The OECD was an important voice promoting OER, addressing issues of inclusion and accessibility of quality informal education. One report advocating their emergence argued that 'OER projects expand access to learning for everyone but most of all for non-traditional groups of students and thus widen participation in higher education' (OECD, 2007a: 11). This report clearly employed the rhetoric of

social justice with reference to OERs as learning resources accessible to 'everyone'. The World Bank higher education specialist William Saint (1999: 3) took a similar line on the potential for OER in Africa, arguing 'It can effectively reach those learners who have been denied access to tertiary education, for example women ... , economically marginalized groups, refugees.' A further argument made by the OECD (2016: 146) was that these resources made 'learning plans more flexible and personalised'. From this extract, we can observe the OECD making the claim that OER constituted a commodity to be packaged and customised according to the individual needs of the consumer. More cynical commentators undertaking evaluations of OER in poorer countries, however, expressed doubt over the 'openness' of these resources. In an OECD discussion paper, the technology and education expert Peter Bateman asserted:

Though OER may theoretically be 'open' and 'free', the reality in the developing world, especially Africa, belies this perception. These resources are neither open nor free to those unable to access the basic, yet necessary infrastructure: computers (with affordable software) and the internet. (Bateman, 2006: 8)

Technology consultant to UNESCO, Paul Albright (2009: 73), agreed that 'Lack of an adequate [ICT] infrastructure is, especially in less developed countries, an obstacle to the dissemination and use of all OER.' The Education and Technology Policy Specialist for the World Bank Michael Trucano (2013) made similar points about MOOCs: 'In many developing countries, there is simply inadequate technology infrastructure to support the systematic use of MOOCs in any substantial way.' The assumption here, in line with perspectives informed by unevenness and non-linearity, was that the diffusion of digital informal learning resources prior to the necessary establishment of correct technological infrastructure indicated how the policy had vaulted ahead of development realities in low-income countries.

Conflicted beliefs over OER effectiveness, and indeed that of MOOCs, in poorer countries as a technology of informal education could be traced back

to the AVU case which served as an antecedent to contemporary framings and further anchored them into the theoretical context. Established by the World Bank and based in Nairobi, the AVU aimed to bring accessible and affordable higher education to Africa through its distance learning packages. The package included a combination of live pre-recorded lectures transmitted by one-way video, two-way audio digital satellite broadcasts, student-instructor e-mail interaction, electronic materials, textbooks, course notes and learner support. In 2002, the AVU project was further legitimated in the discourse through the inclusion of MIT which added its prestige to the growing network of global content providers. The AVU was positively evaluated by major IFIs and their staffs. The economic consultant to the Bank Siddhartha Prakash (2003) described the project in successful terms: 'The AVU has helped reduce the digital divide in Africa and proven that modern communications technology can succeed in Africa.' The OECD (2007a: 106) agreed, describing AVU resources as 'culturally sensitive, educationally and locally relevant, technically feasible and accessible'. These quotes sought to frame the AVU as consistent with the notions of bridging the 'digital divide', openness, and accessibility that shaped the dominant meaning of LWL.

Rival academics involved in education and development, however, were critical of these claims. One line of argumentation framed the AVU project around the colonisation of higher education in Africa. The historian Maurice Amutabi and education policy scholar Moses Oketch (2003: 63) asked 'Is this not part of the scheme by the North to quickly engage and enhance the captive nature of Africa?' The authors here distinctly used a *topos* of abuse argue that the offer of educational assistance extended to Africa through the project had been misused. A report for UNESCO by the development scholar Joel Samoff and the international education academic Bidemi Carrol took a similar view, arguing, 'In immediate and practical terms, external influences are once again directly visible in the increasing use of curriculum developed and packaged overseas, for which the most recent but not sole examples are web-based units and modules' (Samoff and Carrol, 2003: 56). These comments resonate with anxieties over the perverse effects of societal interaction in the liberal growth model, and the belief that the World

Bank's digital higher education policies in Africa were an instrument of subordination driven by capitalist instinct. A second line of argument challenged the accessibility and openness of AVU services. Returning to Amutabi and Oketch (2003: 64), who noted that 'The AVU has the necessary equipment, but the problem of access to the majority still has to be dealt with. This is because very few Kenyans can afford the cost of a telephone let alone software.' Once more back to Stambach (2006: 327) who followed a similar line, arguing that 'Africa is an undifferentiated land where new technology can be used to restructure social relationships.' From these quotes we can see that contradictions arising from the growth path approved in economic liberalism were foremost in the minds of critical scholars, with the underlying belief that digital learning technology embraced by the AVU was reproducing social stratification by providing access to learning to only the most privileged of African students.

In summary, this scene has shown that although commonly perceived as an inclusive concept of learning and progress supportive of LLL, on the contrary LWL was a site of intense dispute. For one, dominant Western framings of informal education proved controversial because of the cultural context in which education became discursively enmeshed with entertainment goods and services. Yet the main source of friction in this scene concerned the digital environment in which LWL matured and the technological nature of the policies adopted in poorer countries. An analysis of digital education innovations highlighting MOOCs and the AVU revealed theoretical tensions over education technologies as a means of modernising low-income countries. Rival actors rejected attempts at using digital learning to meet the scientific criteria of a modern consumer society, electing instead to evaluate such policies in light of the often contradictory and uneven results they produced. Having surveyed LWL, we turn next to the ideational drivers behind debates over budget private schooling in poor communities

6.3 Scene III: Low-fee Private Schools

This scene explores ideational drivers behind the emergence of Low-Fee Private Schools (LFPS) as a conflicted norm resulting from the governance of PPPs in poor countries. It highlights how LFPS were a site for inter-subjective tensions given their claimed status as institutions improving access to quality education for the underprivileged. Section one reveals the strains underlying the key framings of LFPS, both as institutions providing high standards of learning to children and as an affordable option for poor families. Section two presents a case study of the global LFPS chain Bridge International Academies to illustrate how these contested framings were mapped onto the discursive struggles over this controversial chain of schools.

6.3.1 Quality and Affordability

Discursive and political struggles over LFPS took place against the backdrop of a legal drive by governments in poorer countries to abolish primary school fees in their efforts to achieve UPE. Pursuit of this target created a surge in primary enrolment which overwhelmed states struggling with funds to meet the increases in demand. The quality of public education suffered tremendously as a result. With these challenges in mind, the Right to Education Act adopted by the government in India was enacted in 2009 as a constitutional guarantee of access to public education for all 6 to 14-year-olds. The law stipulated that a quarter of all first-grade primary school places in non-state schools were to be allocated to the poorest children with the government promising to reimburse tuition expenses. Reflective of the discursive rise of LFPS in this context was the reaction in the media of private school advocates in India who recognised the threats and opportunities presented by this legal and political scenario. Perceived as a threat to the growing LFPS industry, an article for *The International Herald Tribune* by the business journalist Vikas Bajaj (2011) argued that the Act could 'wipe out many of the private schools now educating millions of students,' adding that 'if you follow the Right to Education, nobody can run a school!' Taking a more optimistic position, in an article for the *Mail Online* the Indian LFPS teacher Rekha Krishnan (2014) stated: 'The mad scramble

for seats in private schools stands testimony to parental aspirations of providing the highest quality of education for their children.' These quotes supporting LFPS in India echoed the beliefs of major international donors responsible for driving the powerful global discourse around LFPS. In its 2013 Education Position Paper committing to LFPS, DfID (2013b: 13) stated 'learning outcomes in low-fee private schools, where they exist, are relatively better than in the state sector, even though they may still be unacceptably low.' The 2011 Education Strategy presented by USAID (2011: 3) similarly noted 'The private sector has a vital short, medium and long term stake in the provision of quality education.' The strategy report concluded that 'This makes business a key partner in efforts to define and address a society's education needs' (USAID, 2011: 3). From these quotes, we observe how the framing of LFPS as a pro-poor education development strategy by the UK and US development departments aligned with the business interests of education entrepreneurs, yet was arguably at odds with humanist efforts towards making progress on the right to education.

A quality frame was clearly observable in the discourse promoting LFPS in poor countries, with the superior standards of private relative to state schooling used to explain increasing levels of demand. The education scholar and entrepreneur James Tooley (2007: 36) was a crucial voice here addressing issues of quality: 'Children in private unaided schools usually perform better in terms of raw scores than in government schools in key curriculum subjects.' A rigorous review of the LFPS literature carried out on behalf of DfID supported this claim, stating that 'Teaching is better in private schools than in state schools, in terms of higher levels of teacher presence and teaching activity as well as teaching approaches that are more likely to lead to improved learning outcomes' (Ashley *et al.*, 2014: 1). The economist working in education and leader of the LEAPS project in Punjab Tahir Andrabi, however, made concessions over of these somewhat hubristic claims:

The only reason the private schools look so good is that the poorly performing public schools are so disastrous: if at some future date, children actually start demanding something more than the most

rudimentary education, the semi-educated teachers in the private schools would actually find it hard to cope. (Andrabi *et al.*, 2008: xiii)

The assumption here was, rather than robust evidence, it was the 'disastrous' performance of state education in poorer countries that was responsible for driving public perceptions of LFPS as offering higher quality education. In her research into perceptions of LFPS in India, the education and development scholar Prachi Srivastava (2006: 499) endorsed this perspective: 'Households in this study perceived the schooling arena to be highly segmented,' adding that 'the state sector was seen to serve the most disadvantaged or least educationally aware from among the lowest socio-economic groups.' This quote from Srivastava resonates strongly with critical perspectives around the commodification of education. Reflective of a consumer society, demand for LFPS among the poor in India was driven by the desires of low-income families to prove their socio-economic status and distinguish themselves from the most disadvantaged in their communities.

Perhaps the most prominent aspect of frame conflict in the discourse on LFPS centred around the claim of affordability. Conflicted meanings arose because, for sceptics at least, the 'low-fee' part of the acronym was considered 'unclear and highly subjective' (Verger, Fontdevila and Zancajo, 2016: 89). The World Bank was an important voice and made a clear statement in favour of LFPS as an inexpensive option for the poor. Its Education Strategy 2020 stated:

Although it is often assumed that the private sector serves mainly students who can most easily afford to pay, private entities are providing education to even the poorest communities, especially in areas that governments do not reach. (World Bank, 2011: 35)

Here we see the Bank making the claim that LFPS advanced progress towards achieving EFA by serving the needs of the many, including the 'poorest' who had slipped through the net of state education, rather than the few. The research of the omnipresent James Tooley added to the

legitimation of this affordability framing. Drawing on data from Sub-Saharan Africa and South Asia, a study co-authored by Tooley and the international education academic Pauline Dixon concluded 'private schools form the majority of provision and are serving the majority of schoolchildren,' adding that 'comparing fees at primary school level with official minimum wages, private schools appear affordable to many' (Tooley and Dixon, 2006: 457). These quotes show Tooley and Dixon using bodies of knowledge to scientifically rationalise the policy practices of organisations and governments endorsing LFPS. It is worth noting here that concessions were made in the discourse by such advocates as to the limits to which LFPS could go in serving the poorest whilst making a profit. For instance, an earlier article by Tooley and Dixon (2005: 24) had conceded that 'free places' were awarded to 'those in financially difficult positions'. Further concessions were made over affordability in the independent LFPS study for DfID quoted earlier, stating 'attending private schools tends to be more expensive for users than attending state school in terms of school fees and meeting the more hidden costs' (Ashley *et al.*, 2014: 52). These concessionary extracts were evidence of the lack of clarity around LFPS, a weakness that was exploited in the discourse by adversaries of private schooling who struggled to delegitimise this affordability frame.

The counter-framing of this dominant representation of LFPS as affordable was led by resistance from both critical educationists and advocates of the right-based approach to international education. One powerful argument pointed to the difficult trade-offs faced by families sending their children to budget private schools. The 2009 GMR argued 'When poor households pay for education, they divert income from other areas, including nutrition, health, shelter and savings for emergencies' (UNESCO, 2009: 166). The education and development scholars Joanna Härmä and Pauline Rose made similar points:

a policy approach that promotes [LFPS] for the poor is likely to reinforce inequalities as the poorest households are unable to pay even relatively modest fees and other direct costs of attending these schools, or can only do so by making great sacrifices affecting

resources available for their other basic needs. (Härmä and Rose, 2012: 244)

These extracts clearly employed argumentation around the *topos* of justice to argue that charging even low fees constituted an active process of exclusion for the 'poorest households' that often made major 'sacrifices' to cover the costs of LFPS. From this perspective, LFPS were reflective of how the social exclusion tendencies of economic liberalism had become embedded in the efforts to provide higher standards of education to poor communities.

The affordability frame was of further concern to humanist-leaning actors who also worried that LFPS intensified social divisions in poorer countries. Firstly, LFPS were argued to be discriminatory. The education sociologist Geetha Nambissan (2012: 51) contended that these schools were 'inherently unjust and discriminate against the rights of children'. This perspective was supported by the international education academic Keith Lewin (2007: 2) who argued 'there is no simple 'Stateless' solution to delivering human rights commitments to educational access, especially to the most marginalised.' In an article for *The Guardian*, the Special Rapporteur Kishore Singh (2015) agreed, arguing 'Privatisation cripples the notion of education as a universal human right and – by aggravating marginalisation and exclusion – runs counter to the fundamental principles of human rights law.' What these actors seem to have been trying to convey was that LFPS were at odds with humanist values and convictions driving towards the progressive realisation of the right to education. The following quote from the Special Rapporteur Katarina Tomaševski (2006a: 2) took this counter-framing further, referring to 'the abyss between the domestic policies of wealthy creditor and donor governments which keep compulsory education free, and their external policies which have made it for-fee.' The assumption here was that of a contradiction in liberal modernisation values observable in the discrepancy between the domestic and foreign education policies of wealthy Western nations when it came to affordable schooling. Tomaševski indicates the perverse effects resulting

from how the underprivileged in poor societies were paying fees to LFPS while fee-paying schools in the UK and US remained the preserve of elites.

6.3.2 Bridge International Academies

This section presents a case study analysing the divergent beliefs behind the discourse on the low-fee school chain Bridge International Academies (BIA) thus putting frame conflict over LFPS into context. Many of these tensions could equally be applied to other chains, for example Omega Schools, that featured in the LFPS debates. However, the main focus will be on BIA due to its prominence in the literature and also to limitations of space. Founded in 2007, BIA opened its first school in Kenya (later extending operations to Liberia, Nigeria, Uganda and India) and is estimated to have educated 500,000 students worldwide. Its list of investors include the World Bank, DfID, the Gates Foundation and the Chan Zuckerberg Initiative. To elaborate, in 2014 BIA received £3.5m of foreign aid from DfID to establish 250 schools in Nigeria. In the Developing Effective Private Education in Nigeria programme 'Improving the cash flow and revenue of private schools' (DfID, 2016a: ii) was noted as a key commitment.

As with LFPS more generally, a major discursive flashpoint concerned the affordability of BIA schools as an accessible option for the poor in settings where schools sprung up. In an article for *The African News*, the international development fellow for the Aspen Institute Esther Ngumbi (2017) noted that '[BIA] in Kenya is tapping into technology to ensure that students receive a world-class education for as low as 6 dollars a month.' Here, we can see language similar to that of the World Bank President Jim Yong Kim. In his speech pointing out the importance of investment in education in ending extreme poverty by 2030, Kim stated:

[BIA] uses software and tablets in schools that teach over 100,000 students in Kenya and Uganda. After about two years, students' average scores for reading and math have risen high above their public school peers. The cost per student at Bridge Academies is just \$6 dollars a month. (Kim, 2015)

This quote shows Kim endorsing the claim that BIA provided education to the poor at the monthly cost of 'just \$6'. His personal authority further legitimated the notion that BIA was affordable. The '\$6' soundbite could be traced back to BIA (2016) online promotional material arguing that its schools were an 'affordable' option for low-income families. However, a joint statement by 30 signatories (including the ActionAid International divisions of Kenya) and signed by scores of supporting organisations was critical of this rhetoric. The statement argued:

The figure given of \$6 is not accurate. Schools fees at BIA range from about \$6.5 to \$9, depending on the grade ... Other costs for textbooks, payment transfers, or other items may be added, and so a conservative estimate of the real monthly amount received by BIA for each child ranges rather between \$9 and \$13 a month. (Joint Statement, 2015: 2)

This statement clearly employed a *topos* of numbers to challenge the claim that BIA schools were affordable, pointing out that the '\$6' figure contradicted actual 'fees' and other hidden 'costs'. The educationist Joanna Härmä (2017: 26) made similar points, arguing that 'the \$6 per month figure cited is neither accurate nor all-inclusive'. These quotes resonate when viewed from a critical perspective on liberal modernisation and anomalous patterns of unevenness. They highlight the strangeness of the World Bank's notional support for poverty reduction policies which endorsed charging school fees to families that struggled to afford the even the most basic of necessities.

Teachers unions and representative networks strengthened this counter-framing of BIA as unaffordable by advancing several key arguments. Firstly, it was argued that BIA schools were exclusionary because poorer parents struggled to pay fees. A joint report by Education International and the Kenya National Union of Teachers (2016: 6) noted, 'parents of BIA students admitted that these fees were pushing them into debt or causing them to struggle to pay for food and healthcare.' In an interview with *The Nation* (2018), the President of the Nigeria Union of Teachers Michael Alogba-

Olukoya agreed, arguing 'These schools are not accessible at all, certainly not to the poor, and are, therefore, contributing to a growing inequality and segregation in education.' Both quotes sought to frame BIA as unaffordable by describing the 'struggle' of fee payers and resulting 'segregation' in communities. A second key argument questioned the ethics of BIA policies used to manage the children of parents who failed to pay fees. Returning to the Education International (2016: 6) joint report which stated, 'Regular payments are strictly enforced and students who are behind with payments are excluded from the classroom.' This was a reference to BIAs 'not allowed in class' policy designed to pressure parents to promptly pay their fees. A study headed by the international education academic Elaine Unterhalter (2018: 50) took this argument further, asserting that 'the undermining of children's health and wellbeing through the humiliations of separation, being sent home, or not receiving a report card, mitigate against provision of quality education and strategies of inclusion'. These quotes resonate when viewed from the perspective of education as a human right and hark back to the UN CRC which prohibited exclusion from learning. This was echoed in the response to DfID's investment in BIA by the UN Committee on the Rights of the Child (2016: 4), which expressed concern over 'deepened inequalities' and 'leaving behind children who cannot afford even low-fee schools'. As Unterhalter (2018: 52) concluded in her report, 'the BIA model had turned education into a commodity, and this undermined the delivery of quality as children who could not pay were excluded.' The assumption here was that LFPS chains undermined the right to education by supporting the commodification of education as a generic service that could be marketed and sold through instalment plans and aggressive pricing strategies.

Another discursive struggle unearthed through the analysis concerned the different interpretations of standardisation used to either legitimate or challenge evaluations of BIA schools as high-quality providers. Central to BIA's (2019) standardisation efforts were the scripted lesson guides downloaded onto tablets, or 'teacher computers' that Bridge provided its instructors with. In a case study for the Harvard Business School, the BIA

standardised operational model was approved by the economist V. Kasturi Rangan:

The 'School-in-a-Box' standardized instruction by providing lesson plans and scripts for teachers, and standardized the daily operations of the school by providing the School Manager with a detailed manual which outlined how to manage the school's finances and personnel as well as how to interact with students and parents. (Rangan and Lee, 2010: 8)

The assumption here was that the 'School-in-a-Box' model, with 'plans' and 'scripts' loaded onto teacher's tablets, meant bringing consistently high standards of education to poorer countries. Working on this assumption, the standardised approach was legitimated in three ways. Firstly, through the authority of opinion-leading institutions. The 'School-in-a-Box' label had already gone some way to engineering consent for the model since the term had previously been used by UNICEF (2003: 5) to refer to education kits for use in humanitarian emergencies. With approval from, among other positive case studies, Harvard Business School and the misleading residues of humanitarian efforts combined, BIA garnered wider support for its standardised operations. Further authorisation for 'School-in-a-box' was manufactured by the World Bank (2016: 169) that noted 'in contexts where public schools are failing, a standardized private sector model may be a viable option for improving learning outcomes.' Second, legitimation was leveraged by the scientific logic of scripted lessons. BIA rationalised the use of scripting as integral to the standardised model through the research of leading education researchers. One example was the support of the educationist and statistician John Hattie (2009: 87) who noted, 'the concept of excellent teaching is the close following of scripts'. Finally, moral evaluations articulated through analogies with other famous service chains further legitimated the standardised teaching model. In an interview for the Harvard case study cited above, the BIA co-founder Jay Kimmelman was quoted as stating, 'If we want to be able to operate like McDonald's we need to be sure that we systematize every process, every tool – everything we do' (Rangan and Lee, 2010: 14). This analogy was developed in an article

for *Wired* magazine by the journalist Dayo Olopade (2013) who stated 'Bridge delivers low-cost education with the consistent quality of Starbucks.' These quotes sought to frame BIA as a consistently high-quality provider of education, comparable to the consistency with which fast-food and coffee chains offer a uniform experience to equally satisfy consumers wherever they may be in the world.

Worried about the impact this standardisation approach was having on the teaching profession, discursive resistance led by critics of LFPS chains sought to destabilise the 'School-in-a-Box' model. Reporting on her visit to a BIA school for *The New York Times*, the journalist Peg Tyre (2017) described a classroom scenario she had observed: 'pupils occasionally asked questions, but Bridge instructors ignored them. Teachers say that they are required to read the day's script as written or risk a reprimand or eventual termination, and they do not have time to entertain questions.' From this quote we can see that the de-professionalisation of teachers was foremost in the mind of Peg. The educationist Antoni Verger (2016: 103) also had a sceptical take on this model, arguing that 'Due to their emphasis on standardisation and the prescription of lesson plans, LFPS chains challenge the concept of teachers as professionals'. In supporting this line, the educationist Jonanna Härmä turned the aforementioned fast-food chain analogy on its head. In a study on BIA for ActionAid, Härmä (2017: 9) stated 'There are clear parallels with fast-food chains, where the components of the meal are delivered in as advanced a state of preparation as possible to each outlet for locally recruited, unskilled workers to assemble and deliver to the customer'. The education sociologist Geetha Nambissan took the de-skilling argument further by considering the implications of this for the learning outcomes of children:

the training of teachers in low-cost schools is merely the 'drilling' of young people to perform the role of 'less skilled workers' who will transact a narrow set of skills – standardised, homogenised and mechanical skills that will not provide a meaningful and holistic education for children. (Nambissan, 2012: 58)

This quote clearly employed a humanitarian line of argumentation, with reference to how the de-skilling of teachers undermined the relative high standards of 'holistic education' valued as sacrosanct by humanists. Policy advisors to Voluntary Service Overseas and the CfBT, Chikondi Mpokosa and Susy Ndaruhutse (2008: 11) agreed, noting that 'When teachers are not adequately trained, children are denied their right to a quality education.' The assumption here was that the standardisation of teaching practices through by LFPS chains vitiated the right to education in several ways. On the one hand, scripted lessons para-skilled instructors and therefore undermined the rights of qualified teachers, while on the other it was deleterious to the standard of education being received as instructors taught to the script rather than to the child.

To sum up, far from being a liberal consensus on the proven ability of private schools to provide to the poor, the analysis revealed serious tensions in the rival beliefs that formed and evaluated policy around LFPS. The quality and affordability frames were central to this controversy as representations of LFPS providing educational excellence to poor families at affordable prices clashed with beliefs opposing this model and its underlying neoliberal values. The BIA case study further illustrated these tensions in context through the conflicting ideas exposed by debates over the chain's aggressive marketing language and commitment to standardisation. BIA highlighted the irony of this practical application of LFPS policy approach: that what was originally intended as a blooming of private creativity innovation against an education system based around rigid bureaucratic planning, turned out as a one-size-fits-all standardised learning model. In this scene the transnational scaling-up of LFPS resonated strongly with economic liberalism, specifically the tendency of external actors to manufacture the prescribed growth path in poorer countries, as actors deliberated over the suitability of these schools and the part they played in developing a modern consumer society. This brings us to the penultimate scene of the outcomes act which investigates the tensions around language policy in international education.

6.4 Scene IV: Language of Instruction

This scene explores the ideational drivers of language of instruction (LOI) policies and the beliefs behind differing evaluations that came to light through the analysis. Respectful of the significant colonial history around language policy, particularly the installation of European languages as official languages following independence for the purposes of national stability and international communication, this scene analyses discursive struggles in their historical context. That said, the data is mostly from the 1990s onwards because it was from this point in modern history that the wisdom of unilingual education, even in the mother-tongue, was seriously challenged in the discourse. In light of this contemporary focus, language issues will be analysed as an element of globalisation that affected LOI policy in poorer settings. Section one surveys the conflicted framings of bilingual education and the discursive strategies that developed and resisted the dominant narrative. Section two puts these representations into context with a case study exploring frame conflict around the outcomes of bilingual policies in post-genocide Rwanda.

6.4.1 Deconstructing Bilingual Education

This section surveys the beliefs behind two conflicted framings of bilingual education that emerged as prominent in the LOI discourse. The dominant framing cast bilingual policy as transitional, meaning an early shift from mother-tongue to a majority language medium of instruction. This corresponded to the bilingual subtractive model of education, commonly formulated as $L1 + L2 - L1 \rightarrow L2$. The World Bank was the most important voice here and made a clear statement in favour of the transitional model:

The capacity for language grows considerably [between 6 to 12 years] so it is a critical time for learning grammar, second or third languages, and expanding vocabulary. Children in these age groups benefit from the instructional use of their mother tongue, combined with instruction in the dominant language. (World Bank, 2011: 28)

This quote shows the Bank exercising its personal authority to make the claim that 'dominant' exoglossic languages were key to achieving better learning outcomes and that transition at primary school age was optimal. The assumption was that teaching exclusively in the mother-tongue allowed for the reproduction of disadvantage in the understanding that speakers of indigenous languages were considered to be amongst the world's poorest. The Bank (2011: 17) went on to note, 'Educational progress lags even more among children and youth who face multiple sources of disadvantage', before mentioning 'ethnolinguistic background' as one of these sources. This perspective was shared in a report by the Bank's economist specialising in education Harry Patrinos and the development economist Gillette Hall (2010: 6) who argued 'indigenous peoples make up about 5 percent and about 10 percent of the worlds' poor; yet they account for only 4 percent of the world's total population.' These quotes sought to frame dominant languages in association with learning for development and modernisation, whilst indigenous and minority languages reflected local knowledge and backwardness.

This LOI policy prioritising early transition was further rationalised through the evaluation of majority language learning resources as superior. The 2018 WDR noted 'the materials available for mother tongue instruction may be limited and of lower quality than materials in the lingua franca' (World Bank, 2018: 135). A survey of learning resources for USAID took a similar line, asserting that 'although materials exist in a wide range of languages, for many languages, the available materials are insufficient to adequately support children's reading development' (RTI International, 2016: 7). The Special Rapporteur Katarina Tomaševski, however, was critical of this. She argued that 'Because the publishing industry flourishes in big international rather than small minority languages, a clash between these two objectives – a flourishing private sector publishing industry and instruction in indigenous/minority languages – is inevitable' (UNCHR, 2000b: 12). This quote shows Tomaševski making the claim that transition to a majority language of instruction served the needs of the international 'publishing industry' over and above the rights of indigenous people.

This criticism leads us to a broader discursive challenge of this dominant transitional framing deployed by academics concerned over the implied linkages between education, language and the economy. The educationalist Colin Lankshear (1998: 316) argued that although 'humanist' considerations were foregrounded in bilingual policies designed to tackle poverty, 'economic motives generally emerge as the "real" reasons behind efforts to promote foreign language proficiency'. The sociolinguist Maryam Borjian (2014: 7) agreed, arguing that 'bilingualism can be valued if and only if the second language involves a language with a high economic power.' These comments resonate with the wider theoretical context informed by education as a commodity, specifically around the marketing of majority language proficiency as an economic asset driving the global marketplace of language instruction and the production of language education materials.

A rival representation framed bilingual education as multilingualism and was consistent with multicultural and multilingual efforts to promote global dialogue. In this framing languages were of equal value and to be taught according to an integrated pedagogy, often expressed through the formula $L1 + L2 = L1 + L2$. UNESCO was an important actor here, and its position paper *Education in a Multilingual World* stated that 'a careful balance needs to be made between enabling people to use local languages in learning and providing access to global languages of communication through education' (UNESCO, 2003a: 8). Maryam Borjian (2014: 6) described this as UNESCO making the point that 'it is the basic human right of every individual to have the right to speak, read and write [...] or receive education in one's first language'. The main analytical observation to be drawn here is that multilingual education committed to maintaining instruction through indigenous or minority languages, in tandem with teaching through majority languages, was in accordance with humanistic values promoting the right to education.

This counter-framing was supported by several powerful forms of argumentation. Firstly, a *topos* of humanitarianism was employed to challenge LOI policies that eroded support for mother-tongue instruction

thus undermining the rights-based approach. Following this line, the human rights law scholar Fons Coomans (2007: 203) argued that 'states must not frustrate the right of members of national, ethnic, or linguistic minorities to be taught in their mother tongue,' adding that 'the right to be educated in the language of one's choice belongs to the core content of the right to education. It is one of the elements of the state's obligation to respect that right.' This quote shows Coomans using his authority to underscore the claim that mother-tongue instruction was integral to the right to education. Secondly, a *topos* of law was employed to argue that state-sponsored language discrimination in education was prohibited in rights legislation. Among the many conventions quoted by humanist actors working on LOI, a frequently cited treaty provision prohibiting prejudice against minority languages was the UNESCO Convention on Discrimination in Education. Article 5 recognised 'the right of members of national minorities to carry on their own educational activities,' adding that this included 'teaching of their own language' (UNESCO, 1960: 6). Katarina Tomaševski (2001b: 15) supported this argument, maintaining that education was, 'unacceptable if the language is foreign to young children'. In other words, teaching exclusively in dominant languages was culturally inappropriate, of an inadequate standard and at odds with human rights legal norms around the acceptability of education.

Further supporting this counter-framing, a powerful line of argument applied the *topos* of advantage to argue that teaching in the mother-tongue made education available to marginalised groups and enhanced learning outcomes. As the 2010 GMR put it, 'One reason that many linguistic and ethnic minority children perform poorly in school is that they are often taught in a language they struggle to understand' (UNESCO, 2010: 10). The international education scholar Carolyn Benson (2004: 16) endorsed this perspective, arguing 'Mother tongue-based bilingual education not only increases access to skills but also raises the quality of basic education by facilitating classroom interaction and integration of prior knowledge and experiences with new learning.' This argument was supported by evidence from a mother-tongue instruction success story that cited data from inclusive teaching policies in Guatemala. A study by UNICEF (2003: 83)

referenced the Nueva Escuela Unitaria Bilingüe programme which promoted Mayan languages, concluding: 'The result is a completion rate above the national average and a high enrolment rate for girls.' Similarly, a widely-cited study by the linguists Stephen Walter and Ronald Morren on Guatemala found that 'attendance of a bilingual school increased the likelihood of proceeding to a higher level of education by 48 per cent' (Walter and Morren, 2004 quoted in Walter and Benson, 2012: 298). The main analytical observation to be drawn from these arguments is the probability that teaching in exoglossic languages further reproduced distortionary effects that challenged liberal modernisation beliefs. This was because if education systems in poorer countries were struggling to deliver quality education to minorities in the vernacular, then opting for a dominant LOI reflected a linguistic leap beyond the current stage of progress.

6.4.2 LOI in Rwanda

This section presents a case study illustrating how the above framings of bilingual education were manifested in practical struggles over LOI in post-genocide Rwanda. Other cases could have been fruitfully added here to further generalise from these discursive struggles, most notably the Zapatista struggle over instruction in indigenous languages in Mexico. But mindful of the need to thoroughly present a detailed case, and again due to the limitations on space, the singular experience of Rwanda was decided on to fully illustrate inter-subjective tensions.

The case of Rwanda, traditionally a francophone country and former Belgian colony, emerged from the literature as an interesting example of the hostilities inherent in bilingual education given its switch from French to English-medium instruction. Following the aftermath of the 1994 Rwandan genocide, the country operated a multilingual policy with early-grade students studying in the Kinyarwanda mother-tongue before transitioning to either French or English at the advanced primary grades. In 2008 the government of Paul Kagame's Rwandan Patriotic Front (RPF) reformed its LOI policy to drop French in favour of English as the one and only medium of instruction for the later-primary levels of schooling onwards. The policy was welcomed in an article for *The New Times* by the Rwandan journalist

Edmund Kagire (2008) who noted 'English is spoken globally in development circles, ICT, trade, among others, and it is also a tool of integration. We don't want to be left behind.' Such positive evaluations of this and other reforms by the RPF in the Rwandan media coincided with affirmative appraisals from powerful international actors. One broad example was the country's rise to prominence in the World Bank's *Ease of Doing Business Scale*. The 2010 Doing Business Report described Rwanda as a 'top reformer' of business regulation by way of simplifying procedures for starting up a business, managing cross-border trade, protecting investors and accessing credit (World Bank, 2009: 23). Of greater relevance to the LOI reforms was how Rwanda's instructional policy was framed as consistent with the global values of the English language teaching industry. The reform was supported by the Rwanda English Action Programme, an initiative between DfID, the British Council and the Ministry of Education in Rwanda aimed towards improving English language teaching. The British Council (2010: 16) noted that the policy would 'provide opportunities for thousands of young Rwandans to participate in their country's development'. A report compiled for the Council by market research company Euromonitor International (2010: 4) agreed, noting that the move demonstrated 'recognition of the importance of English in order to communicate with the international business world'. These comments resonate strongly with the theoretical context of economic liberalism with reference to the promotion of global interaction and cooperation. They demonstrate the discursive efforts of DfID and the British Council to shape Rwanda's LOI policy around global English priorities to transform the country into an educated modern consumer society and foster its integration into the world economy.

Sceptics critically evaluated Rwanda's LOI reform through a counter-framing that applied a range of discursive arguments. One line of criticism argued the switch to English was challenging given the low existing levels of English in the country. The educationalist Emmanuel Sibomana (2014: 27) argued that 'The acquisition of English as a second language in Rwanda is still facing challenges mainly due to a very limited use of this language in everyday communication in the Rwandan community.' The educationalists Beth Samuelson and Sarah Freedman (2010: 211) agreed, arguing that

'transitioning students to English in Primary 1 does not allow them a chance to develop literacy in their own language and puts them at risk of never developing advanced literacy in English.' These quotes sought to negatively frame the reform around the understanding that Rwanda was a largely monolingual society reliant on Kinyarwanda for all activities. The following quotes demonstrate another aspect of adopting English as the LOI. The English language education researcher John Gray (2012: 97) observed the British Council's focus on Rwanda's policy, describing it as an example of how 'the [English language teaching industry] repeatedly equates both development and education with English'. Describing this broader phenomenon forcefully, the educationist Colin Lankshear (1998: 314) made reference to second-language education as a 'new and pressing capitalist instrumentality'. The assumption here was that by equating English with education for development, the British Council, supported by DfID and the Rwandan Ministry of Education, were behind a neoliberal ploy to commodify education in Rwanda and further promote global English as an internationally tradable good and service.

In addition, further discursive resistance was observable through the framing of Rwanda's policy of English instruction as both elitist and discriminatory. Taking this view, the educationalists Beth Samuelson and Sarah Freedman argued:

English is seen as an important world language, but it is also the language of the elite in Rwanda, and a means for the elite to tighten its hold on privilege and power. Proficiency in English is seen as a key to economic development, business opportunities, and knowledge transfer. (Samuelson and Freedman, 2010: 211)

This quote shows the authors framing the LOI policy as injurious given the history of conflict in Rwanda and how English was bound up with the 'privilege' and 'power' of the RPF political elite. Concessions to this powerful argument were made in the report by Euromonitor (2010: 72) which accepted that the small percentage of those using English were 'likely to be part of the political elite or more affluent consumer segments'. The applied

linguist Eddie Williams (2011: 44-45) agreed, describing the reform as a plot to 'anglicise' Rwanda, and warned that 'Rwanda will generate a small English-proficient elite'. The main analytical observation to be drawn from the this 'elite' counter-framing concerns the political sensitivity of the reform given that English was language of the Tutsi-led RPF that emerged as victors from the conflict by defeating the mainly Francophone Hutu perpetrators of the genocide. It was perhaps ironic then, that opting exclusively for English as the LOI echoed the post-colonial European belief that 'the coherence of a society strongly benefits from the existence of just one language' (Blommaert and Verschueren, 1998: 191). These comments resonate strongly with criticisms of outsider intervention in the path to progress given that the blinkered efforts of foreigners, notably DfID and the British Council in this case, to advance global English blinded them to the possible policy risks given Rwanda's historical path to progress which bore the recent scars of ethnic violence.

In summary, this scene has demonstrated that far from being a consensual aspect of the outcomes, LOI was a site of intense controversy among policy actors and commentators. Firstly, analysis of the bilingual education literature revealed tensions between two key framings. The dominant representation shaped policy around a timely transition to a dominant European language in the belief that language was an economic factor of education that fostered integration to the global knowledge economy. This was at odds with the rival multilingual framing that supported integration of the vernacular and rejected teaching in a singular 'foreign' language as impairing the right to education. The Rwandan case illustrated how the effects of bilingual education policies in this context were interpreted discordantly by unmasking the beliefs of opposing actors. It highlighted the controversial nature of majority language-based instruction policy decisions in post-colonial nations beset with a troubled history of ethnolinguistic tensions. Having surveyed LOI, we now turn to the final scene of the act to investigate to discursive tensions around philanthropic actors.

6.5 Scene V: Philanthropy

This scene explores the ideational drivers behind educational policies that supported or challenged growing norms around philanthropy and corporate social responsibility known as 'philanthrocapitalism' (Edwards, 2008). Section one contextualises the emergence of corporate philanthropy in the wider field of development before analysing the beliefs of policy actors in international education who discursively sought to advance or contest the sedimentation of this norm. Section two presents a case study on the One Laptop per Child initiative, a key venture that illustrated the tensions of philanthropic involvement in the promotion of education for development.

6.5.1 Philanthrocapitalism and its Discontents

The extent to which doing development through philanthropy emerged as a powerful norm was noticeable in the British media coverage that depicted philanthropic funding as a solution to UK government pressures around reducing public spending on foreign aid. If many Development Assistance Committee donor governments were already failing in their commitments to meet agreed targets set by OECD members to set aside 0.7 percent of gross national income for official development assistance, then the 2008 global financial crisis placed increasing burden on aid budgets. The role philanthropy could play in alleviating these pressures was discussed in reference to David Cameron's defence of maintaining the UK commitment to the Committee target. Writing for *The Times*, the CEO of Save the Children Jasmine Whitbread (2009) stated, 'The economic climate sharpens Tory rank and file criticism that aid is anti-business, and help would be better delivered through personal or corporate philanthropy.' In an article for *The Telegraph*, the political commentator Gerald Warner (2009) agreed, noting 'Cameron's thinking on foreign aid is about three generations behind free-market American philanthropic institutes. They have given up on conventional state aid to governments and embraced private philanthropy helping poor people to fend for themselves.' These extracts provide a clear example of how philanthropy was cast as an innovative and anti-dependency alternative to foreign aid. Such sentiment was echoed in the left-leaning media. In an article for *The Guardian*, the journalist Mark Tran

(2011) wrote 'Without the political accountability and economic spending constraints that most donors face, foundations are better placed to take on more risk and foster new approaches and partnerships.' Over the intervening years between the recovery from the crisis and the lead up to Brexit, the entrepreneurial values of philanthropy could be traced to the UK government's development strategy. In an article in the *Mail Online* the Secretary for International Development Priti Patel (2016) noted 'We must seize the opportunity of leaving the EU to expand free trade with those who need it most, to boost investment in the poorest countries, and to forge new alliances with the world's emerging economies.' In this quote we see the traces of philanthropic influence in the merging of business interests and benevolence that characterised the shift in UK development funding strategy from aid to trade as demands were placed on foreign assistance to serve not only the poor, but also the national interest.

The gradual blurring of the boundaries between profits and serving the poor reflected the emergence of a powerful norm that framed the status of the corporate philanthropist in development as that of a neutral actor. This framing was legitimated through the discourse of influential institutions and individual actors. One OECD (2003b: 11) study supporting the role of philanthropy in international development stated, 'official agencies owe private foundations the respect due to an elder.' Here we see the OECD legitimating the rebirth of philanthropic activity in poorer countries through the authority of tradition, the notion that philanthropy was following age-long customs and throwing back to major historical contributions that predated official programmes such as the Green Revolution. In his speech to the 2008 World Economic Forum at Davos, announcing his plans to devote more of his time to his foundation's efforts, Bill Gates noted:

The challenge here is to design a system where market incentives, including profits and recognition, drive [corporate responsibility] principles to do more for the poor. I like to call this idea creative capitalism, an approach where governments, businesses, and nonprofits work together to stretch the reach of market forces so that

more people can make a profit, or gain recognition, doing work that eases the world's inequities. (Gates, 2008)

In this quote Gates even-handedly framed philanthropic activity in the development sector, with 'creative capitalism' deployed as a method of promoting poverty reduction to the global business community. In this sense, the interests of 'profit' were not in conflict with serving the 'poor' and the easing the 'inequities' suffered by the disadvantaged. Legitimizing this discursive packaging of profit and poverty alleviation was the famous work of management strategist C.K. Prahalad (2006) and his notion of the 'bottom-of-the-pyramid' which pointed to untapped markets at the lower levels of the global income distribution structure. Put differently, there was a profitable consumer base of the working poor in low-income countries to whom philanthropic foundations could market their goods and services while lifting them out of poverty.

Growing consent over corporate philanthropy as an international education norm could be traced through the literature of a diverse range of actors. The World Bank's 2020 Education Sector Strategy legitimated the important role of philanthropic organisations in achieving learning for all. As part of this strategy, foundations were proposed essential partners in 'knowledge generation and exchange activities' (World Bank, 2011: 72). The Pearson Foundation, which served as the philanthropy arm of the global edu-business Pearson until its activities were integrated into its core business through its corporate social responsibility programme in 2014, made similar points. Aligning with the Bank's strategy, the Pearson Foundation (2014) committed to 'promoting literacy, learning and great teaching'. The Special Rapporteur Kishore Singh agreed with these developments, noting: 'Education is a public good. As a noble cause, it can generate social support and induce public contributions in a philanthropic spirit, if properly encouraged by policies of good governance in the education system' (UNHRC, 2014: 22). This quote from the Special Rapporteur framing philanthropy as consistent with the right to education highlights the extent to which philanthropic activity gained acceptance from a diverse range of actors.

Enabling this advancement of philanthropic norms in the development and international education discourse was the alignment of the corporate responsibility interests of philanthropic actors with the policy priorities of donor governments and their development agencies. This was partly achieved through research directly funded by foundations which was conducted by like-minded think-tanks and strategically aligned policy research institutes. One example of this form of knowledge production picked up in the analysis concerned the work of the Bellagio Initiative, a project led by the Institute of Development Studies (IDS) and funded by the Rockefeller Foundation which formed a series of global consultations aimed at examining the future of philanthropy by investigating opportunities for joint action between development actors and philanthropists. In an article for *The Guardian*, the Initiative's Project Manager and IDS Research Fellow Noshua Watson (2011) noted 'The provision of global public goods is dependent on the willingness of the most fortunate to give to the less fortunate,' adding that 'because they are not responsible to the voting public, philanthropies can more closely meet recipients' needs and help them build capacity.' In an evidence session conducted by the UK Parliament International Development Committee (IDC) on the role of foundations in development, Noshua Watson stated: 'Philanthropy and foundations are one part of the international development ecosystem, and I think it would be unreasonable for us to make strategic recommendations without taking that into account' (House of Commons, 2012). Watson's 'ecosystem' analogy effectively framed philanthropic actors as a natural inhabitant of the development environment. The research outputs of the Bellagio Initiative were performative to the extent that a greater role for philanthropists in development was at the core of the IDC's recommendations: 'The idea of "profit with a purpose" products, whereby funding brings about financial as well as social returns, merits serious consideration as a new way to incentivise the business community to become more involved in development' (House of Commons, 2012: 32). The main analytical observation to be drawn from this quote is that it reflects how the values of philanthrocapitalism that combined 'profit' with 'social returns' were absorbed and endorsed by the UK government.

It was via this same group of documents that philanthropic involvement in international education was discursively legitimated. Making the case for greater activity on behalf of the Bellagio Initiative, the senior fellow at the Brookings Institution Kevin Watkins (2011: 2) stated 'Education represents a small share of corporate philanthropic finance.' Watkins (2011: 2) went on to cautiously note that 'development agencies should be aware of the potential pitfalls associated with the market-based quick fixes preferred by some major philanthropic actors.' Although expressed with caution, the expert status of Watkins authorised support for philanthropy in international education. The IDC report went on to recommend that 'DfID should encourage foundations to move into the education sector' (House of Commons, 2012: 33). Obliging, the subsequent DfID (2013b: 20) education position paper noted 'New partnerships are being built across academic institutions and with the growing number of private foundations.' The paper credited major philanthropic organisations, including the Hewlett Foundation and the Aga Khan Foundation, with strengthening DfID's leadership on global education policy research. From these extracts we can observe how the altruistic framing of philanthropy advanced by policy institutes and the UK government extended the philanthrocapitalist norm to education's role in promoting societal progress.

The tentative tone taken by Kevin Watkins and other experts when considering the place of philanthropy to support learning in low-income countries was indicative of the tensions located in the counter-framings of philanthropy that disputed its neutral and noble status. Among others, the international education scholar Prachi Srivastava and Jonathan van Fleet, a fellow at the Brookings Institution's Center for Universal Education, were important voices here. They were prominent in exposing contradictions thereby providing discursive resistance to emergent corporate philanthropy norms in education. Firstly, a *topos* of justice was used to argue that philanthropic ventures in education perpetuated inequity. van Fleet (2012: 176) argued, 'Corporate philanthropy directed to education naturally gravitates away from the most marginalised populations.' Srivastava (2012: 144) agreed noting that 'countries most in need of additional funding are in

fact receiving it from private foundations.’ Responsible for coining the term philanthrocapitalism, Michael Edwards (2008: 8) also thought this, describing the phenomena as ‘a symptom of a disordered and profoundly unequal world’. Second, a *topos* of definition was employed to argue that philanthropists carried the traits and attributes of business as opposed to charity. Sceptical that philanthropists were financing the advancement of privatisation on the sector, Srivastava argued:

the act of ‘doing good’ may be broadly termed ‘philanthropic’, but is of a nature quite different from traditional non-profit grant-making philanthropies in the ‘business of charity’. Many of the non-state actors [...] involved with the diffusion of corporate-backed low-fee private school chains and their allied service providers operate with mental models framed by, and the modalities of, the ‘business of making money’ with an added offshoot of ‘doing good’. (Srivastava, 2016: 250)

Here Srivastava framed philanthropists as partisan actors by differentiating ‘business’ from ‘charity’ and emphasising the distinction between ‘making money’ and ‘doing good’. van Fleet (2012: 173) agreed with Srivastava, noting that ‘Unlike altruism, corporate philanthropy, in practice, is accompanied by profit-generating motives.’ Describing the interventions of venture philanthropists more forcefully, the education policy scholar Kenneth Saltman (2010: 133) argued that ‘The capitalist logic of alienation plays out in education to treat schooling as a consumable commodity and treat knowledge as units of product to be consumed by students.’ The assumption here was that philanthropic initiatives were a further manifestation of the neoliberal values responsible for intensifying the commodification of education in poor countries.

Adding to this counter-framing, a third line of argumentation agentialised the claims that philanthropy was a predatory and premediated profit-driven activity by expressly incriminating tech businesses. Questioning the neutrality of large US philanthropic initiatives, Srivastava (2012: 137-138) argued that ‘private foundations are not solely driven by altruistic concerns

but with a certain level of calculated self-interest.’ The technology and education academic Neil Selwyn also had a sceptical take on tech sector actors:

the role of technology firms in philanthropic work in low-income contexts is clearly a multifaceted area – motivated as much by the longer-term benefits of building stable national participants in the global ‘knowledge economy’, as they are by the shorter-term benefits of increased sales in ‘emerging markets’. (Selwyn, 2012: 115)

This quote shows Selwyn making the claim that philanthropists who prioritised the development of ‘markets’ under the banner of ‘philanthropic work’ were primarily motivated by their genetic desire to increase ‘sales’ and develop the tech consumer base. van Fleet (2012: 167) made similar points, arguing that ‘Philanthropic contributions serve the purpose of creating demand in both the public and private sectors for consumer or technology goods.’ These comments again resonate when viewed from a theoretical perspective informed by education as commodity as they stress concern over how sales of digital learning goods in poorer communities were perceived as being foremost in the minds of the philanthropists engaged in education.

6.5.2 The \$100 Laptop

This section illustrates the above debates and ideational conflicts through a case study of the One Laptop Per Child (OLPC) philanthropic venture, often referred to by the media as ‘the \$100 laptop’ (The Sydney Morning Herald, 2007). Other cases such as the Girl Hub initiative between the Nike Foundation and DfID were considered for inclusion to provide comparisons. But considering the prominence of OLPC in the discourse as a significant case reflecting the technological contours of philanthropy in education, and in the ever-present pressures of space, a more detailed singular case study was decided on.

Announced in a speech at the 2005 World Economic Forum, OLPC was a non-profit venture established by the technologist and academic Nicholas

Negroponete, a founding member of MIT's prestigious MediaLab department. The venture aimed to overcome education quality issues in poorer communities by providing every child with an inexpensive laptop. An article for *The New York Times* by the technology reporter John Markoff (2005) triumphantly declared Negroponete as 'the Johnny Appleseed of the digital era'. Drawing analogies with the American missionary and gardener who introduced apple trees to states across the mid-west of North America, this was an example of how Negroponete's image as a benevolent actor was enabled by positive media coverage. Until disbanded in 2014, the project was driven by the OLPC Foundation which received philanthropic funding from Google, Nortel, Intel, and News Corporation.

The OLPC venture was chiefly legitimated through the personal authority of key actors supporting the project. Upon presenting a prototype of the so-called XO model at the 2005 World Summit on the Information Society in Tunis, UN Secretary-General Kofi Annan (2005) announced: 'these robust and versatile machines will enable kids to become more active in their own learning.' In his speech, Annan (2005) went on to describe the venture as a 'moving expression of global solidarity and corporate citizenship'. Outlining his vision for OLPC in a TED talk, Negroponete (2006) himself took a similar tone, stating that 'it is a humanitarian effort, it is a nonprofit effort, and to criticize it is a little bit stupid!' These quotes sought to frame OLPC as a revolutionary project that reflected the humanistic values driving the right to education. The notion that OLPC could provide poor rural children with solid educational base for societal progress was further legitimated through a rationalisation that constructed the purpose of the laptop as 'in the child', so to speak. At the 2007 Digital Life Design conference in Munich, Negroponete asserted 'It's not by training teachers. It's not about building schools. With all due respect, it's not about curriculum or content. It's about leveraging the children themselves' (Vota, 2007). In a documentary for TED following the implementation of OLPC in Colombia, Negroponete (2008) took this point further: 'Suddenly, the kids have connected laptops. They've leapfrogged! The change is absolutely monumental, because it's not just opening it up, but it's opening it up to the rest of the world'. This quote from Negroponete resonates strongly with liberal modernisation beliefs in that we

observe a resurfacing of the 'digital leapfrogging' rhetoric. The assumption was that, under the banner of philanthropy, laptops could skip stages on the path of educational and social progress as yet unattained by poorer countries and fast-track them to an advanced stage of high-quality digital learning furnished with ICT consumables. As the commercial policy scholar J.P. Singh (1999: 204) put it: 'If societal problems can be understood as technological ones, then the manageability of the problem increases.' In other words, OLPC was reflective of the pragmatic trouble-shooting of philanthropic actors, particularly those affiliated with tech firms, that offered rapid technical solutions to complex policy issues based on beliefs that equated digital goods and services with progress.

Critical interim and post-venture evaluations of OLPC contributed towards the counter-narrative resisting norms around the role of philanthropy in international education. Firstly, the evidence from studies by economists investigating the results of education technology in low-income settings suggested that OLPC had a limited effect on the quality of learning outcomes. A study into the venture's impact on primary schools in rural Peru led by the Inter-American Development Bank economist Julian Cristia (2012: 16) noted 'no statistically significant effects on Math and Language'. The report concluded that 'computers by themselves, at least as initially delivered by the OLPC program, do not increase achievement in curricular areas' (Cristia *et al.*, 2012: 21). In his study evaluating the effectiveness of OLPC in Nepal, the development economist Uttam Sharma (2014: 53) agreed, arguing that 'computer assisted learning in Nepal has had no statistically significant positive impact on student learning, non-cognitive skills or attendance as reported in school records'. Negatively framing OLPC as a failed venture that was unsuccessful in affecting the quality of instruction in poor countries discursively challenged the efficacy of philanthropic work done by tech firms.

Central to this counter-narrative was the framing of OLPC by critical education scholars as a project that attempted to cross the so-called digital divide rather than bridging the tech gap between rich and poor. Commenting on a pilot of OLPC conducted in Peru, the education and communication academics Mark Warschauer and Morgan Ames argued:

A number of the country's rural schools still lack electricity access and those that do have electricity access sometimes have only one outlet in the principal's office, making charging—and subsequently using—the laptops nearly impossible. Most schools lack Internet access, further limiting how the laptops can be used. (Warschauer and Ames, 2010: 38)

This quote shows the authors making the claim that OLPC interventions failed because philanthropists ignored local contexts and on-the-ground conditions that would have alerted them to 'electricity' shortages and 'internet access' issues in the local infrastructure. Sceptical of the top-down logic of OLPC and comparable business sector-led philanthropic projects, Prachi Srivastava (2016: 439) took a similar view, arguing 'This bypasses local intermediaries and can drive out or neglect the knowledge and expertise of local communities and organizations, limiting the sustainable impact of education initiatives.' The business scholar Kenneth Kraemer, a sympathetic supporter of the OLPC venture, made related concessions:

OLPC recognized correctly that laptops could reach the poorest children only if they were subsidized by government or other funding sources. This is similar to rural electrification and telephone service, which usually cannot be provided economically and end up subsidized by government or by charges to urban customers who can be served profitably. (Kraemer, Dedrick and Sharma, 2009: 72)

This quote shows Kraemer conceding to the OLPC venture's mis-judgement of the local political sphere and oversight in expectations of government and populations to 'subsidise' the necessary infrastructure to improve learning. These comments resonate with the theoretical context of the linear path to achieving a modern society entrenched in economic liberalism. For these critical actors, OLPC attempted to map a post-industrial digital education blueprint onto a pre-industrial landscape with neither the political capability nor structural support necessary to take full advantage of the venture.

To summarise, the role of corporate philanthropy in international education provided a controversial finale to the outcomes act. Philanthropy emerged as a powerful yet conflicted norm in the context of debates over development funding as donors faced mounting challenges in meeting foreign aid commitments. Against this background, analysis revealed the underlying beliefs behind the blurring of profit and 'doing good' that drove discursive support for philanthropic engagement in poverty reduction. Sceptical of philanthrocapitalism as a powerful norm shaping international education policy, voices of resistance reframed the venture as part of a wider neoliberal plot to further render education a commodity. The OLPC case was illustrative of these discursive tensions, especially concerning the willingness of tech sector philanthropists to take risks, drive innovation and fund ambitious education projects that major donors tended to shy away from. Critics evaluated these projects as the inappropriate imposition of economic liberal values on poor communities at odds with traditional socio-cultural structures and local conditions for political and economic maturation.

6.6 Act Summary

This act explored the conflicted beliefs behind international education policies put in place and the differing evaluations they received. The outcomes related to the process act because it surveyed the effects of practical policies that emerged from the administrative system governing international education. In narrative terms, it was the final stage in the quest as individual and institutional cast members arrived at destinations that either agreed or clashed with their intended aspirations, desirable to some yet disappointing to others. The above scenes were informed by a lower tier of theory organised around a binary of opposing positions. Aligned with the principles of economic liberalism, one point addressed the degree to which education had been transformed into a commodity, while the other more critical pole was concerned with how far society had gone towards the progressive realisation of education as a human right.

Throughout this act we have witnessed ideational discord over the effects of education policies put into practice. At the heart of this disquiet were challenges levelled against the commodification of education as a key factor reflecting progress towards a modern consumer society that, according to the modernisation beliefs rooted in economic liberalism, announced the ultimate stage of growth. The analysis revealed how these theoretical debates were manifested in the discourse. Importantly, it highlighted the critical perspectives of those who believed that education policies tended to bring about developmental irregularities thereby contradicting dominant economic liberal thinking that perceived policy outcomes as consistent with the linear path to progress. A key observation drawn from the analysis indicates that these distortions, together with the impact of external actors and institutions that altered the developmental path in poorer societies, seemed to suggest that support for the growth model grounded in economic liberalism had somewhat diminished. Evidence suggesting as much was highlighted in the powerful cases flowing from the technological subplot, notably the AVU and OLPC experiences, that indicated the undesirable effects of policies deploying digital education services in societies that had yet to fully reap the rewards of industrialisation. That said, there was more

of a hint of futility than cause for celebration among actors whose thinking broke with liberal economic values, and for two related reasons. The first was simply that the resulting commodification of education could not easily be undone. Secondly, this rendering of education as a commodity was seemingly preordained since the mechanisms guiding its reproduction had already been established by the technologies of power embedded in the process which dominated the grand narrative.

In addition to revealing the hidden narrative and theoretical struggles in this act, applying IDA to the data elicited three discursive shifts concealed in the discourse. First, technology once again proved to be a consistent subplot, thus maintaining its status as a symbolic yet contentious marker of progress in the liberal education model. The primary importance of innovations including the use of 'teacher computers' at BIA schools added to the tensions over the appropriacy of technological solutions for education in poor countries and the resulting impact on education as a human right. A second discursive shift involved the resurgence of the knowledge economy as a key contextual factor. Whereas in the vision it formed the background for aspirations urging individuals to develop skills and knowledge to achieve economic prosperity, in the outcomes we observed an imperative to promote learning opportunities throughout the lives of individuals in order to stimulate and satisfy educational demand perceived to be a key driver of the modern economy. Specifically, individuals spanning the full continuum of LLL and LWL were cast in dual roles of consumers and producers, of both knowledge products and skill-building services, considered responsible for driving the knowledge economy. This discursive re-emergence of the knowledge economy in the outcomes was encoded into, among other rhetorical devices, the 'bridging the digital divide' metaphor that featured in the second scene. A final discursive shift concerned the relationship between the process and the outcomes in the grand narrative. Contrary to the analyst's expectations that the significance of the outcomes would outweigh those of the process, our findings suggested the opposite. Indications of this tendency were observable through the manner in which the market principles of efficiency, results and performance were etched into the discursive fabric of the outcomes act. This was detectable from the

dominance of standardisation as a favoured approach by neoliberal-leaning actors who defended policy decisions on areas such as majority languages and 'school-in-a-box' that minimised inputs (e.g. teacher training) and maximised impacts (e.g. the learning outcomes of the privileged). Taken together with the discursive shifts from the vision and process acts, these subtle variations in the outcomes discourse bring us neatly to the overall aspects of political continuity and change that will be addressed together with the wider implications of these findings in the conclusion.

Conclusion

This study has revealed how the dominant liberal model driving education in the promotion of development between 2000 and 2020 was discursively constructed as a grand narrative about the vision, process and intended outcomes in international education. Applying IDA to official documents has demonstrably reinforced the value of the discourse approach for interpreting public policy dilemmas (see Wash, 2020). The overall plot was mapped out as a quest in which a diverse party of actors each with conflicted visions for education negotiated obstacles and difficulties on a political journey, hopeful for a desirable outcome (see figure 11). The aspirations, mechanisms and effects of the liberal education model were continually in dispute throughout the narrative and fed into the discursive construction of the liberal deal. These three acts were sites of tension for institutions and individual actors whose beliefs were underpinned by (anti-)neoliberal, small 'l' liberal and humanist ideologies. Such positions shaped individual narratives, decisions and subsequently their political actions. Power relations cut across the interdiscursive boundaries from core policy, to the intermediary field (think tanks/lobby groups/academic literature, etc) and through to the media and other cultural artefacts. In the core policy literature reports and speeches proved to be policy in the making and provided a framework for action. The intermediary tier texts either further legitimated the dominant narrative or deployed argumentation strategies to discursively resist dominant framings. Media sources echoed these debates and related them to various contexts that shaped the discourse.

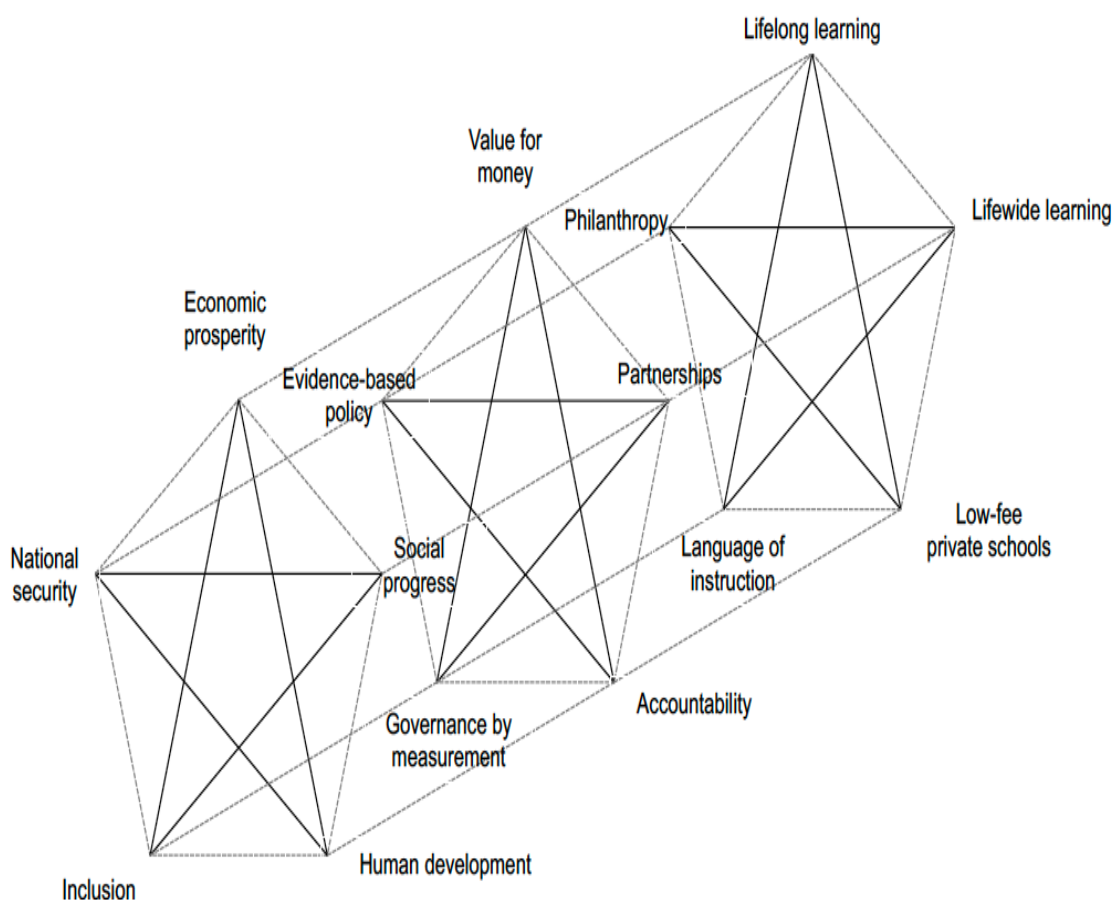
This analysis was informed by a multi-level theoretical context that shaped, structured and elicited the liberal narrative. The overall plot addressed theoretical concerns over the economic aspects of the liberal model of international education, with related assumptions around educational investment, market forces and the desirability of a modern consumer

society all shown to have been controversial factors. Operating beneath the liberal model was a lower level of theory organised around a set of binaries that served the analysis by directing the coding of topics and eliciting the scenes in each act. The vision act was guided by a theoretical struggle over whether education was a social or an economic good. Actors who placed faith in economic logic to determine educational investment decisions were challenged by rival beliefs in education as a social good delivering public benefits beyond higher incomes or GDP growth. In the process theme, a binary debate about marketisation and humanisation informed the analysis. Beliefs leaning towards humanist and anti-neoliberal ideologies struggled to weaken the dominance of commercial norms driving the principles of efficiency, results and performance in the administrative system overseeing international education. Finally, the outcomes were directed by theoretical disputes over the extent to which education had become commodified and whether the progressive realisation of education as a human right had been advanced. The beliefs of those in support of the full achievement and enjoyment of the right to education were challenged by actors who valued a competitive marketplace of educational goods and services as emblematic of attaining the ultimate stage of economic growth. In brief, while the liberal model of international education model shaped the disharmony in the overall narrative, the lower-level theories elicited analytical topics and forged the binaries which brought out power relations in the discourse. In spite of the doubts positivist IR scholars may have over the findings of such interpretivist research as impressionistic, the IDA method showcased in this study incorporated systematic upgrades to provide a credible and reliable approach to analysing the international education discourse.

This chapter reflects on the discursive effects and potential implications for conceptualising the liberal model of international education in this manner with a focus on contemporary developments and challenges. Firstly, an overview of the key continuities and changes in the discourse will be presented. This brings together the smaller discursive shifts revealed by each act to present a broader impression of how the discursive battles over the meaning of international education evolved over the twenty-year period of study. This provides a basis upon which to draw from the analysis several

key policy recommendations that could provide arbitration to conflicted actors and enables space to reflect on avenues for future research. The final section sets out the wider implications of this study by linking these conclusions to contemporary political contexts and global events immediately following the closing of the grand narrative.

Figure 11. Meta-pentagram of the grand narrative

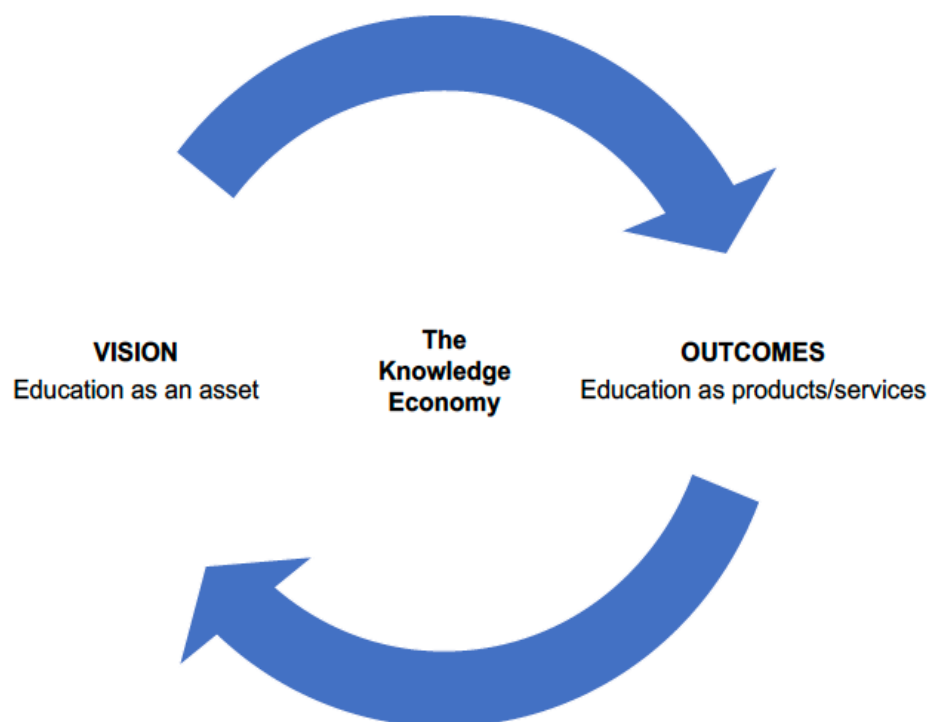


7.1 Continuity and Change

This section summarises the most important continuities and changes revealed by the analysis. Tracking policy continuity and change is important as it not only links minor discursive shifts to broader movements in the discourse but also indicates how voices of resistance were managed in the textual data.

Three important continuities were identified in the narrative. Firstly, a persistent sub-plot running through the entire narrative concerned the continual importance of technology. An ITC sub-plot pervaded the narrative that prioritised competencies and skills to thrive in the post-industrial workforce, management through data monitoring and information systems and commercial digital learning resources. This continuity was perhaps unsurprising given the complementary relationship between technological advancement and classic liberalism. However, the role of technology was constantly under negotiation in the vision (e.g. the relevance of traditional skills), the process (e.g. data management systems) and outcomes (e.g. marketing of online learning services in poorer countries). That said, and as will be touched upon later in the chapter, the implications for technology and learning are rapidly changing and responding to contemporary challenges. Secondly, the consistent salience of the legal sub-plot was also a matter of interest. Legislation was an enduring element throughout the discourse, as demonstrated through the centrality of human rights treaties and conventions that consistently shaped policy debates in international education. Humanists drew heavily on the norms codified in these documents in their attempts to defend and guarantee the legal right to education. This could be observed through the arguments of the Special Rapporteurs that were present in nearly every scene of the story. Finally, of constant relevance was the knowledge economy as a contextual factor that opened and bookended the grand narrative, manufacturing consent over the economic dimensions of the liberal model. The multi-faceted nature of the knowledge economy positioned it as a central point of interdependency linking outcomes with aspirations in a symbiotic relationship (see figure 12). Modern skills and knowledge were assets that allowed individuals to participate and thrive in the post-industrial economy. This aspect of the knowledge economy simultaneously supplied the skilled labour necessary to develop innovative educational products and services (mostly produced in wealthy Western countries) whilst generating demand for them. In brief, the knowledge economy endured as a powerful discursive imaginary which legitimated consent for education as an interconnected cycle of economic assets and commodities.

Figure 12. The knowledge economy interdependency model



There were three main changes from the narrative to highlight. Firstly, the procedures in the governance of international education system continued to grow in significance relative to the outcomes. Whereas the conventional wisdom of strategic planning points to a process driving outcomes, the grand narrative illustrates a shift in the way that outcomes contributed and were subordinate to governing mechanisms. In many ways, the liberal objective of raising standards was advancing the process of privatisation and decentralisation central to the administrative system. For example, the establishment of LFPS was dependent on the process of facilitating private sector involvement in education provision by promoting PPPs between education businesses and the state. This was part of a wider market trend towards a redefinition of educational standards in terms of quality assurance which placed greater importance on 'systems and processes rather than outcomes' (Charlton, 2002: 20, emphasis in original). In international education, quality assurance practices prioritised the efficiency and effectiveness of processes over the effects of these mechanisms (see Biesta, 2010). This trend was reflective of the internalisation of enterprising norms in international education that allowed the dynamics of marketisation to gain

dominance whilst the effects of practical policies were subtly cast aside as a secondary consideration. Secondly, there was a gradual weakening of the dominant economic investment logic driving the vision, shaped by rival beliefs that challenged powerful liberal aspirations for a gainful education that was both remunerative to individuals and capable of generating faster growth. Ideational factors aligned with anti-neoliberal and humanist actors succeeded in eroding the dominant aspiration for economic prosperity through argumentation that better articulated the case for education as a social good. To highlight an example, representations of human development as the fundamental purpose of education were legitimised by the scientific rationalisation of the capabilities approach combined with the impersonal authority of the UN ICESCR. The final change concerns how, in spite of the growing prominence of the right to education agenda, its impact became ever more compromised. Due to the sustained resilience of the rights-based approach to education there was a slow penetration of human rights arguments into the orthodoxy of the liberal model. The Abidjan Principles that act as a point of reference for states, teachers and education providers when negotiating the respective roles of public and private actors provides a case in point and is illustrative of how human rights beliefs migrated inwards from the margins. Yet, if human rights in education were progressing they were also arguably becoming restricted and disempowered by economic and market forces attempting to mainstream this emphatic rise. Indeed, an understanding of how the elevation of human rights has occurred alongside alarming levels of inequality requires placing this trend in the context of neoliberal globalisation (Moyn, 2018). As long as education remains a factor in the marginalisation of the poor and priorities around economic globalisation persist, a permanent question mark will hang over the relevance of this increasingly prominent rights-based approach.

7.2 Recommendations and Future Research

Whilst exposing the tensions behind the seemingly functional liberal education model, this thesis has sympathetically shown that beliefs allied to conflicting ideologies created ruptures in the meaning of international education. A key implication for the value of IDA in unmasking tensions in international education previously obscured by the liberal model is that it

enables the analyst to make significant policy recommendations. This is in the understanding that analytical findings can chart a course to resolution in reconciling differences and preparing the ground for a more functional policy environment. Offering a check-box list of practical policy solutions and claiming these derived from an interpretive analysis would be unwise given the subtlety and sensitivity of the findings. Following Yanow (2003), perhaps a humbler and more empathetic course of action is to mediate over what the arguments for and oppositions to revising the liberal model of international education would actually entail. Key to this enterprise would be an appreciation of the ideational nuances drawn out by the analysis.

A mediation sympathetic to the struggles of actors to reconcile rifts in the meaning of international education would occur over several phases. The first step derives from the theoretical effects of the thesis and involves greater acknowledgement of the tensions inherent in the liberal education model in respect of the internal contradictions of liberalism itself. For the grand narrative reveals a paradoxical scenario wherein we have a classic liberalism that promotes cooperation and human perfectibility on the one hand, and an international education model grounded in economic liberalism compromised with internal conflict on the other. This has been demonstrated through the constant discursive battle over meaning fought between actors whose values were divided between small 'l' liberal, (anti-)neoliberal and humanist leanings. Such inconsistency is perhaps unsurprising given the intolerance to other strands of thought that emerged from classic liberalism (see Berlin, 2002 [1958]). A common understanding of the pre-existing tensions within which conflicts experienced in the liberal education model were rooted could lay the foundations for negotiations. Key to this mediation towards a more functional policy model would be the forming of a commonly agreed ethos over what constituted progress. This kind of moral code might go some way towards resolving the tensions over more salient policy continuities and changes that surfaced from the analysis. For instance, the sustained significance of the technology sub-plot as a source of tension in the grand narrative could be re-examined in this spirit. Across the acts of this story we saw instances of technology advanced in the name of progress yet in conflict with liberal humanism. A multi-

stakeholder exploration of the limits of technology for promoting development through education in terms of ethos could open up reconciliatory routes. Such paths of mediation might concern themselves with the loss of academic community, communal aspects of learning and the potential impact of educational technology on civil engagement. The ongoing subordination of outcomes to the mechanisms behind the administration of international education driven by the technologies of the market model could also be mediated through this sense of ethos. In particular, the standardisation of education practices compelled by ever increasing demands for better efficiency, monitoring and greater levels of accountability. These priorities were clearly at odds with the sensibilities of educating the whole person and development of people in ways that were not easily measurable or benchmarked. Reconciliation might proceed through a renegotiation of this imbalance between outcomes and process by settling tensions over what needs to be measured, to what extent and how.

A consideration of the above policy recommendations together with the discursive effects of continuity and change revealed by the analysis paves the way for a future research agenda, which could possibly have four strands. The first strand would enhance our knowledge of the liberal education model by expanding on particular elements of its discursive construction in the interdisciplinary spirit supported by this thesis. For instance, in the outcomes act my treatment of curriculum and pedagogical matters was only to illustrate how they were used to resolve quality and access issues at the delivery end. Further research could offer a more detailed picture of how curriculum, teacher pedagogy and materials were brought to bear on achieving higher standards and greater equity. In addition, although humanist beliefs factor heavily in the destabilisation of the liberal model, ideational factors associated with post-humanism were barely touched upon. The post-human condition has been well documented by political theorists including a study by David Chandler and Julian Reid (2016) into how (neo)liberalism has reduced humans to compete for survival by compelling them to build resilience. Further research including post-humanist positions in educational debates, possibly added as an

agential-leanings, could provide a more critical perspective on human rights values in education. This could offer a more detailed picture of resilience in international education and potentially pick up on other hidden sub-plots based around environmental concerns. The third strand would draw attention to questions of directional influence between policy at the national and global institutional level which, as mentioned in the introduction, were beyond the scope of this study. For instance, one could ask whether the pro-market priorities of the Blair and Bush Jnr administrations were being driven by the neoliberal thinking of the World Bank or vice-versa. Although this study did not try to track causation in ideational factors, focusing instead on narratives, there is certainly a case to be made for a future study investigating policy networks and chains of influence (see Marsh and Rhodes, 1992) to develop our understanding of global education policy. Furthermore, in the spirit of diversity encouraged by the unified theory of discourse, analytical approaches such as interpretive process tracing (Bennett and Checkel, 2015) and network analysis (Hafner-Burton, Kahler and Montgomery, 2009) could be fruitfully integrated with IDA to explore how causal processes unfold over time or how policy actors interact to shape wider social structures.

A final strand of future research would take further advantage of interpretive approaches for the production of empirical evidence to deepen our understanding of public policy issues. As Schulze-Cleven et al (2017) concur, interpretive research that detects subtle socio-political shifts in education is vital for developing our knowledge of fundamental challenges and sharpening our awareness of how the forces of capitalism can be shaped by ideational factors. The authors identify similar trends in studies of higher education as those garnered from the IDA method applied in this study. For instance, the nature in which neoliberal actors including Western governments and international institutions have forged ever closer links between public education and the market economy. Another example is the reliance on measurement in the governance of education through monitoring, data collection, benchmarking and systematic evaluation. These trends could be perceived as the 'new technology of discursively mediated power' (Schulze-Cleven *et al.*, 2017: 803). Other work such as

Angermuller's (2017) insightful study into the identities and careers of academics furthers our understanding of this discursive interplay between the market and education. His analysis reveals how academics inhabiting institutional systems in economies based around enterprise capitalism are subject to market forms of valuation and self-definition. Careers in these settings reflect and are constrained by market factors such as wider income gaps and weaker job security. These findings are relevant to those of the present case study since they indicate ways in which the forces of marketisation may be shaping education practices. Future research building on this platform would advance the notion that the discourse approach furthers our understanding and provides a solid empirical platform to begin thinking about how to resolve such public policy dilemmas.

7.3 Implications for the post-2020 Era

In January 2020 the curtain fell on the grand narrative yet the discursive and political practices in international education uncovered in this study remain relevant to contemporary developments. This final section asks what the implications of the findings of this study might be by reflecting on events in the years immediately following the narrative. Firstly, it is useful to highlight some of the major developments in the education policy reports that occurred between the time of completing the analysis and finishing writing up this study. With the lamentable progress made on the EFA goals still fresh in the memory, the outlook for meeting the education targets for SDG 4 was far from positive. Even soon after the launch of the goals, official forecasts were gloomy and the 2016 GEMR declared that the 2030 target concerning universal secondary education was 'unattainable' (UNESCO, 2016: 173). Critics, reflective of the failed promises of the EFA goals, argued that this pessimism was indicative of how major institutions were reneging on their SDG promises. Indeed, Klees (2017: 437-438) argued that the SDGs were 'not urgent enough' and described progress on improving lives through achieving education targets as 'global triage'. The GEMRs published after the period of analysis identified familiar barriers to achieving the targets that featured in the analytical chapters. For instance, inclusion remained a persistent problem. In her foreword to the 2020 GMR, the Director-General of UNESCO Audrey Azoulay warned that 'education

opportunities continue to be unequally distributed' (UNESCO, 2020: iii). Similarly, the role of non-state actors remained a controversial issue. Background research for the 2021 GEMR continued to find the role of the private sector in the provision, financing, regulation and management of education to be sustained barrier to progress (see Srivastava, 2020). Frustrated with this lack of progress and in line with a key aspect of policy change identified in this study, recent literature indicates that critical scholars are gradually turning their attention to the technologies of power embedded in the process behind the administration of international education. Studies scrutinising the effects of mechanisms such as the World Bank's Systems Approach for Better Education Results (SABER) and its Education 2020 Strategy provide a case in point. Critical reviews of SABER only began to surface nearly a decade after its inception to challenge the universality of its benchmarking claims and question the system's underlying neoliberal ideology (see Klees *et al.*, 2020). By pivoting critical attention towards parts of the process such as measurement, these developments in the literature are addressing a key aspect of policy change highlighted in this study. Namely, that the rival beliefs challenging mainstream assumptions over practical policy outcomes made a greater impact during the period of study than those that sought to undermine dominant norms driving the process. In light of this pivot to the process, the dominant act in the overall narrative, it is anticipated that further studies will follow suit to tackle the entrenched market-based norms that allowed mechanisms embedded in the administrative system of international education to go relatively unchallenged throughout the grand narrative.

A second issue to consider is the impact of the Trump presidency that perhaps went undetected in the story of international education. Trump's four years in office and the evident shift in US foreign policy priorities during his term in office are clearly of relevance here and raise a number of questions. Did Trump's populism in the final years of the period of study derail progress in a manner that perhaps wasn't noticeable to commentators whose works featured in the analysis? Did the UN agencies adapt their liberal ideals in response to Trump's populism and nationalism, or did they

double-down and intensify their commitments? In this study, the effects of Trump's retreat from globalisation and multilateralism went seemingly undetected in the core policy documents produced after 2016 that featured in the international education corpus. However, recent literature on trends in aid flows to poorer countries provide some insight here. Viktor Jakupec's (2018) timely investigation into the potential impact of the Trump presidency and the re-emergence of nationalist politics on development aid is one example. For Jakupec, Trump's brand of populism and economic protectionism amounted to a myopic and transactional form of diplomacy with the potential to significantly alter the values of foreign aid. Grounded in the mercantilist philosophy of the Trump administration, there were signs that the neoliberal trend of using aid to expand trade could be replaced by an entrepreneurial model of trade *instead* of development assistance. These predictions offer a potential link to a further study that could apply IDA specifically to an analysis of international education policy during and immediately following the Trump presidency to reveal to extent to which his brand of foreign policy impacted norms and beliefs around foreign aid to education.

Perhaps the most pressing contemporary development concerns the implications of this study for international education in the context of the Covid-19 pandemic. For one, the economic impact of the virus on the availability of public funds would inevitably affect aid flows to education in poorer countries. In the UK, the impact was such that the British government decreased its foreign aid budget to 0.7% of gross national income to 0.5% in November 2020. This was controversial as the totemic figure of 0.7%, a Conservative party manifesto promise, dated back to a UN target pledged to by Tony Blair which was only achieved under David Cameron during the austerity period following the 2008 global financial crisis. The cuts were criticised by the education for development advocate Kevin Watkins, Chief Executive at Save the Children, who voiced concern over the potential damaging effect on gains made in international education (see McVeigh and Beaumont, 2020; also Save the Children, 2020). Although the exact impact that Covid-19 pandemic might have on the education of the poor is difficult to gauge, indications of the havoc it could wreak can be

estimated from disputes in the education systems of prosperous nations, with cut-backs in UK higher education institutions proving highly controversial. However, it would seem that the weakened economy post-Covid when coupled with the existing education finance crisis threatens the potential of international education to 'build back better'.

A final observation relates to how international education policy responses to Covid-19 have tended to reinforce trends identified in the analysis towards a liberal market economy model of education at odds with the more holistic notion of learning concerned with human perfectibility. It would appear that the pandemic has certainly accelerated many of the analytical discussions in this study, particularly those based around the theoretical binaries wherein the principles of economic liberalism were pitched against humanist concerns. A major issue was the growing importance of technology and digital learning during the pandemic, and the potential impact on both students and teachers as education was hastily switched to online modes of delivery. This follows on from the continuity of technology as a major sub-plot in the grand narrative. Policy responses to Covid-19 over online learning have tended to reinforce the interests of global education tech companies and their learning platforms underpinned by prevailing economic beliefs dominating the liberal education model. The perception of people as chaotic and expensive while technology is viewed as relatively orderly and cheap, with its neoliberal underpinnings, adds legitimacy to the drive towards digital learning (McGrath, 2020). Notionally, the acceleration of this idea is consistent with the unceasing market-based priorities of doing more with less and performance metrics.

But from a human rights perspective, technological developments in light of the pandemic represent a significant threat (UNHRC, 2020). The view of humanists is that online digital learning should only be a temporary solution as its transformation into a new paradigm for education would be injurious to the spirit and purpose of the right to education. In this sense, technology is deleterious to the central importance of personal relationships in education and the sense that learning is a social act conducted communally through human interaction. Education digitisation, as the contemporary

rhetoric of the 'bridging the digital divide' in this analysis has proven, is far from a new discursive buzzword. Yet many of the world's poor remain offline and unreachable which points to a significant widening of inequality in the access to education resulting from school closures. Furthermore, there is concern that this surge in digital technology to support online learning further integrates the private sector into education provision, and with it, the threat of edu-businesses profiting from the Covid-19 crisis. Allied with this perspective is a sense of acute danger that digital learning could be accelerating the commodification of education and limiting its availability to those that can afford it, with philanthropic foundations of tech corporations such as Gates and Hewlett representing major threats. It will be fascinating to see what policy and discursive alterations are put in place to enable international education to 'build back better' in a world that learns how to live with Covid-19 and future global pandemics. Whether these shifts will be noticeable to various audiences or remain concealed by the one-size-fits-all liberal model remains to be seen and investigated.

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Appendices

Appendix 1: Coded Section of a Report

This example of a coded section of a report is from the World Bank Group's Education Strategy 2020 report *Learning for All* (World Bank 2011: v).

Code: *Italics* = Vision; **Bold** = Process; Underline = Outcomes

We are living through a period of extraordinary *change*. The stunning rise of the middle-income countries, led by China, India, and Brazil, has intensified the desire of many nations to increase their *competitiveness* by building more highly *skilled workforces*. Technological advances are *changing job profiles* and *skills*, while offering possibilities for accelerated learning. Persistently high levels of unemployment, especially among youth, have highlighted the failure of education systems to prepare young people with the right skills for the *job market* and have fueled calls for greater opportunity and **accountability**.

Expanding and improving education are key to *adapting to change* and confronting these challenges. Simply put, **investments** in quality education lead to more rapid and sustainable *economic growth* and development. Educated individuals are more *employable*, able to earn *higher wages*, cope better with *economic shocks*, and raise *healthier* children. But although developing countries have made great strides over the past decade toward the Millennium Development Goals of universal primary education and *gender equity*, an abundance of **evidence** shows that many children and youth in developing countries leave school without having learned much at all.

This is why our Education Strategy 2020 sets the goal of achieving Learning for All. Learning for All means ensuring that all children and youth—not just the most privileged or the **smartest**—can not only go to school, but also acquire the knowledge and *skills* that they need to lead *healthy, productive* lives and *secure* meaningful *employment*. The three pillars of our strategy are: **Invest** early. **Invest smartly**. **Invest** for all. To learn more, read on.

Appendix 2: Coding Scheme for the Vision

Scenes	Keywords
<i>Economic prosperity</i>	Personal gain/success. Wages. Income. Job(s) (market). Employment. Economic growth/change/shocks. Wealth (of nations). National/family prosperity. Reliance on aid. Trading potential. Return on investment. GDP. Competitiveness. Tax base. Productivity. Skill(s/ed). Skilled work(ers/force). Knowledge. Creativity. Entrepreneurship. Innovation. Adapt(ing/ability). Ability. Assets.
<i>Social progress</i>	Health(y/ier). Wellbeing. Prevention/mitigation of illness. Nutrition. Welfare. Social/emotional/personal/physical/cognitive development. Socio-emotional skills. Success. Inner-potential. Social cohesion. Cooperation. Birth rate. Social change. Social responsibility. Respect. Civil rights. Mutual understanding. Global/active citizenship.
<i>Human development</i>	Dignity. Individual entitlement. Life choices. Freedom. Fulfil dreams. Hope. Values. Empowerment. Enabling right. Public good. Society. Social justice. Rights. Humanistic (mission). Knowledge is power. (Non-)negotiable. (Un-)conditional. Intellectual commons. Moral (imperative). Capability. Responsibility.
<i>Inclusion</i>	Forced marriage. Equity. Integrat(e/ed/tion). Equality. Segregat(e/ed/ion). Gender. Poverty. Social attitudes. Inclusive development. Patriarchy. Social inclusion/exclusion. Work readiness. employab(le/ility). Product(ive/ivity). Marginalis(ed/ation). Parents. Families. Workfare. Welfare to work. Discrimination. Tolerance.
<i>National stability</i>	Civic values/engagement. Decision making. Solidarity. Peace(building). Nation building. Safety. Tolerance. Stability. Emergencies. Democracy. Freedom. Liberty. Civil Rights. Secur(e/ity).

Appendix 3: Agential Leanings for the Vision (by Level of Corpus)

Small 'l' liberal	<i>Core policy</i>	UNESCO.
	<i>Intermediary</i>	Peter Drucker, Daniel Bell, Charles Handy, Charles Snow, Frank Leavis, Daniel Bell, Cathy Davidson, Amartya Sen, Martha Nussbaum, John Morgan, Ian White, Andrew Price-Smith, Kevin Watkins, Jacques Delors, Colin Power, Varun Gauri, Deepa Narayan, Malala Yousafzai, Maria Rosaria Marella, Tony Evans, Costas Douzinas, Irina Bokova, Ellen Herman, David Adams, Michael Lund, Andreas Mehler, Allan Smith, Tony Vaux.
	<i>Periphery</i>	Macer Hall, Jonathan Sacks, Martin Johnson, Gordon Brown, Jeremy Bentham, Rafiath Rashid, Gladys Nyaga, Ann McFerran, Jane Beasley, Laurence Dodds.
Neoliberal	<i>Core policy</i>	OECD, World Bank, DfID, Nick Hurd, USAID, DfCSF, DfES.
	<i>Intermediary</i>	Harry Patrinos, George Psacharopoulos, Eric Hanushek, Ludger Woessman, Barbara Sianesi, John van Reenan, Lawrence Schweinhart, James Heckman, Paul Collier, Anke Hoeffler.
	<i>Periphery</i>	Diane Coyle, Esther Ngumbi, Mastercard Foundation, Kimani Wa Njuguna, Nisha Arunatilake, Deborah Orr, Tony Blair.
Humanist	<i>Core policy</i>	UNICEF, Kofi Annan, UNDP.
	<i>Intermediary</i>	Maggie Black, Katarina Tomaševski, UN CESCR, UN CRC, UN CEDAW, Fons Coomans, Pedro Flores-Crespo, Kishore Singh, Vernor Muñoz Villalobos, Julian Huxley, Save the Children, Kenneth Bush, Diana Saltarelli.
	<i>Periphery</i>	(none)
Anti-neoliberal	<i>Core policy</i>	(none)
	<i>Intermediary</i>	Bob Jessop, Joel Samoff, Bidemi Carol, Jean-Pierre Jallade, Daisy Christodoulou, James Nolan, Arlie Hochschild, Francine Menashy, Karen Mundy, Antonio Verger, Stephanie Allais, Val Gillies,

	Charlotte Chadderton, Helen Colley, Ruth Levitas, Phil Hodgkinson, Guy Standing, Rania Antonopoulos, Emma Seery.
<i>Periphery</i>	Claire Provost.

Appendix 4: Coding Scheme for the Process

Scenes	Keywords
<i>Value for money</i>	Cost-effective(ness). Efficien(t/cy). Resourceful(ness). Smart(ly/est). Invest(ing/ment). Spend(ing). Performance. Financ(e/cial). Fees. Savings. Cost-cutting. Invest(ing/ment). Equity. Bang for your buck. Results. Budget(ting).
<i>Partnerships</i>	Decentralisation. Devol(ve/ution). Expert(ise). Know-how. Consult(ing/ation). Delegat(e/ion). Private sector. Choice. Competition. Demand. (Dis)invest(ment/or). Contract. Arrangement. Consumer. Clients. Collaborat(e/ive). Risk. Integrat(e/ion).
<i>Accountability</i>	Performance. Results. Duty-holder/bearers. Rights-holders/bearers. Transparen(t/cy). Responsibility. Corruption. Obligation. Commitment. Conviction. Guarantee. Fulfil. Surveillance. Audit. Performance. Blame. Risk. Answerability. Justiceab(le/ility). Judicial. Justice. Enforce(able/ability). Adjudication. Legal. Law(s). Violation.
<i>Governance by measurement</i>	Capacity (building). Data. Statistics. Quantitative. Monitor(ing). Evaluat(e/ion). Information Systems. EMIS. Indicators. Index. Measure(ment). Metrics. Targets. Goals. Reform. On track. Survey. Assessment. Results. Improvement. Analytics. Audit(ors). (Dis)aggregat(ed/ion). Digital. Datafication.
<i>Evidence-based policy</i>	Benchmark(ing). Replica(-able/-te/-ting). Best practice. Evidence (-based/-based policy). Proof. Proven. What works. Transferrable. Scal(e/ing) up.

Appendix 5: Agential Leanings for the Process (by Level of Corpus)

Small 'l' liberal	<i>Core policy</i>	UNESCO, United Nations.
	<i>Intermediary</i>	Claire Hutchings, BOND, Oxfam, Jacques Delors, Ruth Jonathan, John Stuart Mill, Tom Christensen, Per Lægheid Robert Behn, Kanishka Jayasuriya, Jacques Hallak, Muriel Poisson, Syed Adil Gilani, Varun Gauri, Daniel Brinks, Jonathan Fox, David Brown, Gert Biesta, Tahir Andrabi, Masooda Bano, Jishnu Das.
	<i>Periphery</i>	Simon Caulkin, Chris Wilson, Gordon Brown, Jasmine Whitbread, David Cameron, Trevor Kavanagh, Barry Hugill, Natasha Narayan.
Neoliberal	<i>Core policy</i>	HM Treasury, DfES, OECD, ICAI, DfID, USAID, World Bank, IFC, U.S. Dept of Ed.
	<i>Intermediary</i>	Eric Hanushek, Christopher McKenna, Dambisa Moyo, William Easterly, Antinoja Emmi, Penny Jackson, Davis Guggenheim, John Chubb, Terry Moe, Estelle James, George Psacharopoulos, Michael Latham, Norman LaRocque, Harry Patrinos, ASPBAE, Harry Levin, Stuart Bell, James Tooley, Barbara Bruns, S. Galab, Michael Barber, Frederick Hess, Bethany Little, Andreas Schleicher, Christopher Colclough, George Doran, Kenneth Laudon, Jane Laudon, Thomas Cassidy, Charles Villanueva, Tegegn Nuresu Wako, Felipe Barrera-Osorio.
	<i>Periphery</i>	James Slack, Amanda Ripley, The Economist.
Humanist	<i>Core policy</i>	UNICEF.
	<i>Intermediary</i>	Mahbub ul Haq, Katarina Tomaševski, Diane Elson, Fons Coomans, Antenor Hallo de Wolf, UN CESCRC, UN CRC, Right to Education Project, Kishore Singh, The Abidjan Principles, Vernor Muñoz Villalobos.
	<i>Periphery</i>	(none)
Anti-neoliberal	<i>Core policy</i>	(none)
	<i>Intermediary</i>	Harold Perkins, Joseph Zajda, Guy Standing, Geoff Whitty, Michael Apple, Pauline Rose, Gert Biesta, Elizabeth Harrison, Roy Carr-Hill, Jennifer Ozga,

	Stephen Ball, Nelli Piatoeva, Ian Hacking, Christopher Lubienska, Antoni Verger, Kevin Farnsworth, Momina Afridi.
<i>Periphery</i>	Peter Hennesy, Roger Trapp, David Boyle.

Appendix 6: Coding Scheme for the Outcomes

Scenes	Keywords
<i>Lifelong learning</i>	Lifelong education. Second chance. Top/catch up. Learn(ed/er/ing). Accelerated/diversified learning. Early-years/childhood (development/education). Drop out. (Un-)employ(ed/able/ment). Adult literacy. Vocation(al). Holistic. Continu(ed/al/ing) education/learning. Lifespan. Learning throughout life. (Re-)skill(s/ed/ing). Flexible/skilled (workforce). Job profiles.
<i>Lifewide learning</i>	Informal (learning). Flexible. Technolog(y/ical). (Info/edu)tainment. E-learning. Distance learning. (Bridging the) Digital divide. Exclu(de/sion). MOOCs. Online (education resources). Virtual (university). Information. Infrastructure. Exclus(ive/ion). Universal (access). Leisure. ICT. Leapfrog(ged/ging). Interactive radio instruction.
<i>Low-fee private schools</i>	Afforda(ble/bility). Budget. Fees. Profit(able/ability). Standardis(ed/ation). Low (-cost/fee). Private schools. Pay-as-you-learn. Brand (name). Chain. Edu-business. School-in-a-box. Economies of scale. Vertical integration. Uniform. Bridge International Academies. Omega Schools
<i>Language of instruction</i>	Language (policy). English. Mother-tongue. Majority/minority/official/dominant/elite language(s). Customised. Unilingual/bilingual education. Transition. Monolingual/bilingual/multilingual education. Vernacular. Indigenous (people/language). Continued Professional Development.
<i>Philanthropy</i>	Philanthrocapitalism. Philanthropic (spirit/giving). Corporate Social Responsibility. Social enterprise. (Charitable) giving. Foundation. Disburse(ment). Social-impact investors. Creative-capitalism. Doing good. Neutral(ity). Social capitalism.

Appendix 7: Agential Leanings for the Outcomes (by Level of Corpus)

Small 'l' liberal	<i>Core policy</i>	UNESCO, Skolverket, Kofi Annan.
	<i>Intermediary</i>	Jacques Delors, Carolyn Medel-Añonuevo, Colin Power, Peter Drucker, Alexandra Draxler, Katheryn Ecclestone, BRAC, Joseph Farrell, Ash Hartwell, Sobhi Tawil, Steffen Jensen, LEGO Foundation, Patrice Engle, Rosa Torres, Neil Selwyn, Robert Davison, Stuart Leigh, Andrew Epstein, Jennifer Ho, Hetal Thurkral, Steve Kolowich, David Trucano, Laura Day Ashley, Tahir Andrabi, John Hattie, Chikondi Mpokosa, Susy Ndaruhutse, RTI International, Emmanuel Sibomana, Beth Samuelson, Sarah Freedman, Noshua Watson, Kevin Watkins, Uttam Sharma.
	<i>Periphery</i>	Jasmine Whitbread, Mark Tran.
Neoliberal	<i>Core policy</i>	EC, OECD, World Bank, Nick Hurd, Republic of South Africa, South African Department of Education, DfID, USAID, Jim Yong Kim, House of Commons.
	<i>Intermediary</i>	Gordon Betcherman, David Whitebread, James Heckman, Karishma Banga, Dirk Willem te Velde, Kara Sprague, William Saint, Siddhartha Prakash, James Tooley, Pauline Dixon, V. Kasturi Rangan, Katherine Lee, Gillette Hall, Harry Patrinos, British Council, Euromonitor International, C. K. Prahalad, Pearson Foundation, J. P. Singh, Julian Cristia, Kenneth Kraemer.
	<i>Periphery</i>	The Nation, Nguyen Tien Hung, Pretoria News, Greg Beato, Matthew Poyiadgi, Vikas Bajaj, Rekha Krishnan, Esther Ngumbi, BIA, Dayo Olopade, Edmund Kagire, Gerald Warner, Priti Patel, Bill Gates, The Sydney Morning Herald, John Markoff, Nicholas Negroponte.
Humanist	<i>Core policy</i>	UNDP, UNICEF.
	<i>Intermediary</i>	Edgar Faure, Katarina Tomaševski, Kishore Singh, UN Committee on the Rights of the Child, Geetha

		Nambissan, Keith Lewin, Fons Coomans, Carolyn Benson, Stephen Walter.
	<i>Periphery</i>	Kishore Singh.
Anti-neoliberal	<i>Core policy</i>	(none)
	<i>Intermediary</i>	Carmel Borg, Peter Mayo, Les Levidow, Frank Coffield, D. W. Livingston, David Guile, Rosa Maria Torres, H. S. Bhola, Anja Jakobi, John Aitchison, Simon McGrath, Andre Kraak, Stephanie Allais, Robin Usher, Richard Edwards, Amy Stambach, George Malakela, Peter Bateman, Maurice Amutabi, Moses Oketch, Joel Samoff, Bidemi Carol, Prachi Srivastava, Joanna Härmä, Pauline Rose, Education International, Elaine Unterhalter, Antoni Verger, Colin Lankshear, Maryam Borjian, John Gray, Eddie Williams, Jonathan van Fleet, Michael Edwards, Kenneth Saltman, Mark Warschauer, Morgan Ames, Lianna Baur.
	<i>Periphery</i>	Louise Tickle, Michael Alogba-Olukoya, Peg Tyre.