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Globalization, Privatization, Marginalization:
Assessing Connections and Consequences in/through Education

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Globalization, Privatization, Marginalization:
Mapping and Assessing Connections and Consequences
in/through Education¹

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Abstract: This special issue brings together scholars who are working on new aspects of the intersection and implications of globalization, privatization, and marginalization. While globalization's relationship to education has been of great interest to scholars (e.g., Dale,

¹ This special issue complements and is complemented by another special issue entitled "School choice policy and politics around the globe: Sociological contributions," in the journal *Educational Policy* (Potterton, Edwards, Yoon, & Powers, forthcoming).

1999; Green, 1997; Rizvi & Lingard, 2009; Steiner-Khamsi, 2004; Verger, Novelli, & Kosar-Altinyelken, 2018). While the relationship between globalization and various forms of privatization has received significant attention (e.g., Adamson, Astrand, & Darling-Hammond, 2016; Ball, 2009, 2012; Carnoy, 1999; Mohamed & Morris, 2019; Robertson, Mundy, Verger, & Menashy, 2012; Verger, Lubienski, & Steiner-Khamsi, 2016), we seek to extend scholarship in these areas by examining the current connections and continuing consequences of both globalization and privatization for marginalization in/through education, as well as the ways in which the latter (marginalization) creates opportunities for the former (globalization and privatization). Exploring the relationships among globalization, privatization, and marginalization is vitally important for scholars not only because they are related in multiple yet, we argue, insufficiently understood ways, but also because their relations have real consequences for education policy and practice and for the exacerbation of marginalization itself in and through education. As the introductory essay for the special issue, this article (a) presents a framework for understanding the connections among globalization, privatization, and marginalization in relation to education; (b) distills, visually presents, and expands upon the dialectical connections evident “in” and “through” the cases that make up the special issue; and (c) emphasizes a number of lessons for the globalization-privatization-marginalization nexus.

Keywords: Globalization; privatization; marginalization; dialectics; political economy

Globalización, privatización, marginación: Mapeo y evaluación de conexiones y consecuencias en / a través de la educación

Resumen: Este número especial reúne a académicos que están trabajando en nuevos aspectos de la intersección y las implicaciones de la globalización, la privatización y la marginación. Si bien la relación de la globalización con la educación ha sido de gran interés para los académicos (por ejemplo, Dale, 1999; Green, 1997; Rizvi & Lingard, 2009; Steiner-Khamsi, 2004; Verger, Novelli & Kosar-Altinyelken, 2018), y mientras que el la relación entre la globalización y las diversas formas de privatización ha recibido una atención considerable (por ejemplo, Adamson, Astrand & Darling-Hammond, 2016; Ball, 2009, 2012; Carnoy, 1999; Mohamed & Morris, 2019; Robertson, Mundy, Verger & Menashy, 2012; Verger, Lubienski & Steiner-Khamsi, 2016), buscamos ampliar la beca en estas áreas mediante el examen de las conexiones actuales y las consecuencias continuas de la globalización y la privatización para la marginación en / a través de la educación, así como las formas en que la segunda (marginación) crea oportunidades para la primera (globalización y privatización). Explorar las relaciones entre la globalización, la privatización y la marginación es de vital importancia para los académicos no solo porque están relacionados en múltiples formas, sin embargo, argumentamos, de manera insuficientemente entendida, sino también porque sus relaciones tienen consecuencias reales para las políticas y prácticas educativas y para la exacerbación de marginación en sí misma y a través de la educación. Como ensayo introductorio para el número especial, este artículo (a) presenta un marco para comprender las conexiones entre la globalización, la privatización y la marginación en relación con la educación; (b) destila, presenta visualmente y se expande sobre las conexiones dialécticas evidentes “en” y “a través” de los casos que conforman el tema especial; y (c) enfatiza una serie de lecciones para el nexo globalización-privatización-marginación.

Palabras clave: globalización; privatización; marginación dialéctica; economía política

Globalização, privatização, marginalização: Mapeando e avaliando conexões e consequências na / através da educação

Resumo: Esta edição especial reúne estudiosos que estão trabalhando em novos aspectos da interseção e implicações da globalização, privatização e marginalização. Embora a relação da globalização com a educação tenha sido de grande interesse para os estudiosos (por exemplo, Dale, 1999; Green, 1997; Rizvi & Lingard, 2009; Steiner-Khamsi, 2004; Verger, Novelli & Kosar-Altinyelken, 2018), e enquanto a relação entre globalização e várias formas de privatização recebeu atenção significativa (por exemplo, Adamson, Astrand & Darling-Hammond, 2016; Ball, 2009, 2012; Carnoy, 1999; Mohamed & Morris, 2019; Robertson, Mundy, Verger & Menashy, 2012; Verger, Lubienski & Steiner-Khamsi, 2016), buscamos estender a bolsa de estudos nessas áreas examinando as conexões atuais e as consequências contínuas da globalização e privatização da marginalização na / através da educação, bem como as maneiras pelas quais o segundo (marginalização) cria oportunidades para o primeiro (globalização e privatização). Explorar as relações entre globalização, privatização e marginalização é de vital importância para os estudiosos, não apenas porque eles estão relacionados em múltiplos, ainda, argumentamos, maneiras insuficientemente compreendidas, mas também porque suas relações têm consequências reais para a política e prática da educação e para a exacerbação de marginalização em si e através da educação. Como ensaio introdutório para a edição especial, este artigo (a) apresenta uma estrutura para entender as conexões entre globalização, privatização e marginalização em relação à educação; (b) destila, apresenta visualmente e expande as conexões dialéticas evidentes “nos” e “através” dos casos que compõem a questão especial; e (c) enfatiza várias lições para o nexo globalização-privatização-marginalização.

Palavras-chave: Globalização; privatização; marginalização; dialética; economia política

Introduction

In setting the stage for the special issue, this introductory essay takes as its focus three interrelated tasks. The first portion will present a political-economic framework for understanding the core concepts of the special issue—i.e., globalization, privatization, and marginalization—as well as the connections among them. The second portion then does two things. First, as is typical of introductory essays, it introduces the papers that make up the special issue and describes their connection to the overarching theme. Additionally, and importantly, this second section brings an analytic lens to the discussion of the essays found herein. By this we mean that we draw out, depict, and extend the insights documented in each article. Our goal here is to distill and to clarify the findings embedded in the 12 articles that make up this two-part special issue. Our hope is that, in so doing, we can capture, abstract, and highlight the underlying dynamics that are evinced in the studies. While each study offers important findings related to how globalization, privatization, and marginalization connect in and through education, we seek to concentrate in one place the combined insights of the studies, in order that the essential conceptual contributions of each is not lost amid the rich details of each case. In line with this goal, we discuss and visually present the key aspects of each kind of case and the trends with which they are associated.

As will be seen, the papers in this special issue are grouped into two clusters. This grouping reflects the fact that, while all the papers speak to the three core concepts of globalization, privatization, and marginalization, the papers typically place analytic emphasis on two of the three and then consider the implications of their findings for the third. The papers in the first cluster

focus on the ways privatization is being advanced through the dynamics of globalization, and then consider the implications for—or the connections to—marginalization. For example, these papers examine how policymaking processes, the provision of refugee education, quasi-market reform politics, international large-scale assessments of student learning, and the work of international non-governmental organizations are all advanced by political and economic globalization in ways that not only open spaces for privatization but also exacerbate marginalization in various forms.

The papers in the second cluster, in contrast, take as their point of departure various forms of privatization, considering directly their consequences for marginalization. These essays are framed with, and then connect back to, the dynamics of globalization. The different forms of privatization discussed by these papers include charter schools, vouchers, neo-vouchers (i.e., tax credits), and private schools that serve low-income families. Although their analytic focus is not squarely trained on the causes of each kind of privatization, the articles do address the contextual factors and the forces of political-economic globalization that have led to, or have contributed to, the form of privatization under study.

For both clusters of papers, we take the structural or contextual considerations related to globalization and then underscore the ways that they not only connect to privatization and marginalization but do so in a dialectical fashion. As further discussed below, we see this mapping of dialectical relations as one of the key contributions of this introductory essay—and, indeed, of the entire special issue. Two other contributions also stand out. The first has to do with the breadth of privatization forms and processes covered across the two clusters, as mentioned in the examples above. The second has to do with the geographic scope of the studies. In all, the articles report on research from the “Global North”, meaning the United States, Western European and Mediterranean countries (i.e. Portugal, Italy, Israel), and New Zealand, with other studies focusing on the “Global South”, meaning countries in Latin America (i.e., Argentina, Chile, Peru), Africa (Zambia), and Asia (with two papers focused on India). One paper focuses on refugee education generally and thus is not focused on a specific geographic context.

Importantly, the articles contained in this special issue include but go beyond a focus on low-income countries. High-income—“developed”—countries are not immune to the effects of globalization and privatization. It is crucial that we understand the ways that these phenomena manifest across different contexts, not least because, across contexts that may seem wildly different, globalization and privatization have similar effects and are the result of similar forces, though the details of how they play out may be distinct. As a first step to reaching this understanding, the next section presents the framework that guides this essay and the special issue overall.

Globalization, Privatization, and Marginalization: A Political-Economic Approach

Two forms of globalization are of particular relevance for this special issue. The first is economic globalization founded on a system of global capitalism. For our purposes, this is shorthand for the “global connection of markets, production sites, capital investment, and related processes of labor migration” that currently characterize the world economy (Lipman, 2004, p. 6). Economic globalization has contributed to rising standards of living in various parts of the world. However, simultaneously, mobile networks of finance and production, the empowerment of transnational capital in relation to labor, the dominance of neoliberal market logics, and state disinvestments in public services, have all contributed to an overall intensification of economic inequality and the upward distribution and concentration of wealth and power (Held et al., 1999; Robinson, 2004; Rudra, 2008; Piketty, 2014). The global expansion of inequality intersects with new

forms and processes of marginalization. In the Global North, this includes deepening precarity and stagnant wages for workers, growing economic and racial segregation, attacks on Indigenous land rights, and proliferation of new forms of racial and ethnic scapegoating reflected in the rise of right-wing ethnonationalism across Europe, North America, and beyond. In the Global South, marginalization takes similar yet distinct forms including new modes of dispossession from land, such as in India and Brazil, manifesting in the growth of urban slums (Davis, 2006) and in various related forms of political, social, racial, and spatial exclusion (Munck, 2005). For example, the weakening of central states due to the “powerful global marketization of national economies” and the subsequent inability of governments to mitigate the inherent tendency of unfettered markets to produce segregation and exclusion (particularly when combined with racism, classism, sexism, etc.) “pushes the ‘dispossessed’ to seek refuge in new and more *exclusive* collectives” (Carnoy, 1999, p. 78).

As the papers in this special issue show, these forces of dispossession and exclusion not only penetrate the porous ecosystem of education by eroding the social conditions in which young people live and develop, but also place limitations on schools’ abilities to respond, while also opening space for further privatization. This takes place within a more general shift toward neoliberal orientations in state policy and action and a general scarcity of resources available and allocated for public services and educational investment. As a result, because governments face limitations on resources for public services—whether, among other things, because of fiscal impacts of natural disasters, capital flight, embedded institutional corruption and graft, a reduced tax base, or because of the inability or unwillingness to collect or raise taxes—public education suffers both in terms of access and quality (Balsera, Klees, & Archer, 2018). These modes of state dysfunction combined with prevailing market logics driving policy provide fertile conditions for private actors to step in and address the gaps (Edwards, Moschetti, & Caravaca, 2019; Global Campaign for Education, 2016). The inability of governments to provide robust investment and quality services is exacerbated by the fact that capitalist globalization drives states to look for ways to be more lean and competitive (Cerny, 2007). In practice, this means, first, looking for ways to transform educational systems to serve national competitiveness and human capital development so as to attract corporate investment while, second, also looking for ways to reduce public expenditure (Carnoy, 1999). Policymakers have increasingly turned to market logic to achieve both ends (Rizvi & Lingard, 2009; Waslander, Paer & van der Weide, 2010). Although much research has emerged in recent years on the engagement and implications of private actors and market mechanisms in marginalized contexts, this special issue seeks to make a contribution by looking at the privatization-marginalization nexus while also considering the ways that this intersection further contributes to economic globalization.

The second form of globalization of interest is political in nature. As Hay (2002), Gilpin (2001), and others have noted, economic globalization is and has been fundamentally a political process, with the rules and norms that govern markets actively constructed by political actors (see also Panitch & Gandin, 2012). The same is true when it comes to the relationship between globalization and education (Dale, 2000). In what is now termed the global education policy field (Lingard & Rawolle, 2011), a range of actors from across multiple scales (e.g., local, national, regional, global) interact, collaborate, and compete for the purpose of setting and advancing specific goals and agendas, influencing education politics, implementing education policy, and evaluating educational programs (Edwards, Okitsu, da Costa, & Kitamura, 2018; Jakobi, 2009; Robertson et al., 2007). While various kinds of institutions have been involved in the global education policy field in the post-WWII context (Ginsburg, Cooper, Raghu, & Zegarra, 1990), and while various forms of educational privatization have long been tolerated and promoted (Klees, 2008; Verger, Fontdevila, & Zancajo, 2017), recent decades have also been characterized by an acute increase in interest and involvement on the part of non-governmental and private actors (e.g., multi-lateral and bi-lateral

organizations, non-governmental organizations, corporations, philanthropists, etc.; Ball, 2012; Verger, Lubienski, & Steiner-Khamsi, 2016). International political cooperation in the 1940s and 1950s included the creation of various multi-lateral organizations (such as the World Bank and other United Nations organizations) to guide and coordinate global economic and social policy. These processes have intensified, more recently, with the weakening and delegitimization of the state since at least the 1980s in setting education policy and providing educational services, which has allowed for the augmented influence of the range of actors mentioned above (Ball, 2012; Jones & Coleman, 2005). This is not to suggest that states play an inconsequential role, only that they are frequently caught in the middle of global dynamics (including asymmetries of power among states influencing flows of capital and policy) that are beyond their control (Carnoy, 1999). The role of the state will be further discussed in relation to the policies and trends addressed in the articles and then will be emphasized in the concluding comments.

There are many implications to the developments outlined above. They include, for example, the enhanced influence of private agendas (i.e., of the preferences of private actors for reform), the wide circulation and promotion of numerous policies and strategies for private involvement and profit-making in education, the encouragement of various forms of educational privatization (e.g., charter schools, [neo]vouchers, low-fee private schools), and the growing legitimation and acceptance of market logics in the provision of education (e.g., Anderson & Cohen, 2015; Ball, 2012; Ball & Youdell, 2009; Burch, 2006; Bulkey & Burch, 2011; Ndimande & Lubienski, 2017; Saltman, 2014; Steiner-Khamsi, 2015). By extension, a further implication of particular relevance for this special issue is the fact that these logics and forms of privatization have tended to be associated with deepening inequality and marginalization in education (Carnoy, 2000; Klees, 2008). As with the focus on economic globalization, when it comes to political globalization, the papers in this issue go beyond simply a concern with identifying dominant interests and perspectives driving education policymaking, and instead seek also to consider how these dynamics contribute to a privatization-marginalization nexus.

To be clear, when we discuss privatization, we are not only referring to the direct provision of education via private schools. Rather, we refer to the range of ways that the provision and financing of education can be privatized (Patrinos, Barrera-Osorio, & Guaqueta, 2009; see also Adamson & Galloway, this issue) as well as to ways that business and market logics are used to manage education, teaching, and learning. As such, we find the distinction of Ball and Youdell (2009) between privatization “of” education and privatization “in” education to be useful. Whereas the former refers to the provision of education directly by private providers (i.e., private schools), the latter refers to the introduction of new managerial ideas, techniques, and practices from the corporate sector to the governance of public education. These two dimensions have also been labelled exogenous and endogenous privatization, respectively. As the papers in this special issue will show, it is important to consider how privatization “in” education is affecting processes of education policymaking. This concern goes beyond the typical focus on privatization “in” the governance of schools and school systems.

Marginalization is the third key term of interest. A recent paper on the history of this term notes that marginalization (or “marginality”) is a concept that “has remained rather unspecified and subject to ongoing debates” (Bernt & Colini, 2013, p. 14). As such, it is important that we clarify the way that it is understood here. To be specific, the meaning we intend draws on one of the ways that it has been used in the field of sociology, where it has been taken to mean “structural marginality, referring to political, social and economic powerlessness and disadvantage” (Bernt & Colini, 2013, p. 14). However, for us, the focus on marginalization is not about attaining a snapshot of structural marginality at a moment in time, but rather has to do with thinking relationally about who benefits

and who loses in/through education from the combination of globalization and privatization—and how or why. This way of thinking echoes the definition of marginalization: to put or keep in an unimportant or powerless position within a society or group (Merriam-Webster, 2019). Crucially, and as noted above in terms of our focus, there is a *relational and processual* component to marginalization in that we must understand the processes and pathways through which some individuals and groups are put, or kept in political, social, and economic positions of powerlessness and abjection, while others are not. To that end, and with regard to the interaction of globalization and privatization, the papers in this special issue are attentive to “the intertwined chains of dynamics producing different forms of inequalities” (Bernt & Colini, 2013, p. 8) in and through the making of education policy and the provision or financing of educational services.

To be sure, the forces of globalization and privatization function in a dialectic fashion with conditions of marginalization by reinforcing rationales for technocratic market solutions to social problems embedded in the underlying political economy. For example, urban neighborhoods in the United States that are economically marginalized and racially segregated are regularly a target for educational experimentation that relies on privatization and market-based reform strategies (see Means, 2013; Lipman, 2004). Meanwhile, slum contexts in middle- and low-income countries have recently been the site of experimentation for low-fee private schools, with these schools being the result of both international corporate strategy (Riep & Machacek, 2016) and local opportunism in response to insufficient government provision of education in these neglected areas (Edwards, Klees, & Wildish, 2017; Riep, 2015; Srivastava, 2013). Both within and outside the United States, contexts of marginalization have garnered the attention of new global policy actors such as philanthropists who wish to support innovative approaches to solving the problems of education (Au & Lubienski, 2016; Buchanan, 2015; Russakoff, 2015). Relatedly, scholarship has begun to discuss the ways that economic crisis, conflict-affected contexts, humanitarian emergencies, and environmental catastrophe can serve as openings for the insertion or advancement of private actors and educational privatization (Akers, 2012; Edwards, 2018; Menashy & Zakharia, 2017; Novelli, 2016; Saltman, 2008; Verger, Fontdevila & Zancajo, 2017). While recent scholarship has addressed the intersection of globalization, privatization, and marginalization, the articles in this special issue add to and go beyond the examples mentioned above, while also seeking to make the connections among these three dimensions more explicit than perhaps is common.

Mapping and Assessing the Connections and Consequences “in” and “through” Education

When we say that globalization, privatization, and marginalization can be seen “in” education, we are referring to the fact that each of these has direct implications for education itself, for example, in the way schools operate and in the way education policymaking happens. And in the case of marginalization, we refer to the fact that schools (i.e., their policies and the practices of teachers, principals, and students) can contribute to marginalization in multiple forms. As for the idea that these phenomena operate “through” education, we are referring to the fact that the contexts, policies, and practices of education create conditions via which each of them can be further advanced. As will be seen, the cases in this special issue are valuable not only in that they connect these three phenomena in relation to education but also that they help us to understand the ways that they operate across multiple scales, from the global to the local. Indeed, a key contribution of this special issue is that it shows in detail how macro-level phenomena (such as globalization, the spread of privatization, and increasing marginalization) manifest at the local level, while also

demonstrating the ways that local-level conditions then connect back to and co-constitute political-economic globalization, privatization, and marginalization.

In what follows, we provide a series of visuals that distill and depict some of the core connections among globalization, privatization, and marginalization across the articles in this special issue. Mapping these connections allows us to highlight the dialectics of each case, that is, the ways that globalization, privatization, and marginalization reinforce one another and are advanced “in” and “through” education. These visuals result from a political-economic analysis of each case. They are the product of applying the political-economic framework presented above to the insights and contextual features of each article. That said, the discussion is supplemented by additional literature in order to expand on the individual contributions of the articles so that deeper connections can be made across the intersecting processes of globalization, privatization, and marginalization. The visuals included here are intended to highlight the forces and relationships that can be abstracted from each case and which will be relevant to other contexts where these processes are articulated. As such, the visuals do not reflect all the details of each case, only some of their essential characteristics.

Part 1: Privatization and Marginalization In/Through Globalization

As noted, the common thread that connects the articles in the first cluster below is their concern with processes and interventions that stem from political globalization and which advance different forms of privatization, though, as will be discussed, they also connect to economic globalization, albeit in distinct ways. These cases also complement one another by highlighting separate but related aspects of how political globalization is affecting education. The phenomena under study across these articles are education policymaking (in Israel), quasi-market reform politics in the context of austerity (in Portugal), privatization via crisis-making (in refugee contexts), the politics of international large-scale assessments (in Italy), and the discourse around poverty espoused by teachers who work for the local arm of an international network of non-governmental organizations (in New Zealand). In what follows, we describe each case and provide analytic commentary on the dynamics that connect globalization, privatization, and marginalization.

Policymaking. The first article, by Yuval Dvir, Claire Maxwell, and Miri Yemini, examines the process of policymaking that led to the production of a document published by the Israeli Ministry of Education. This document is known as the “Future Oriented Pedagogy Outline” (or FOP policy). Among other things, this policy included a focus on “glocalisation,” which is a doctrine included in the policy through which students develop a “glocal identity” that “includes a harmonious and balanced mix of global and local components and values” (MOE, 2016, p. 94, as cited in Dvir, Maxwell, and Yemini, 2019, this issue). For our purposes, what stands out, first, is that this doctrine is presented in the policy “as an instrument to prepare students for their adult lives in a globalizing economy and world” (p. 16). While there is nothing inherently wrong with glocalisation as defined by the Israeli government, the authors point out that this conception of glocalisation is embedded, both, in the larger neoliberal economic narrative found in the FOP policy, and in “the gradual transition of the Israeli education system from a centralized socio-democratic operational mode into a decentralized, market-oriented one” (p. 16). Seen from this perspective, the FOP policy generally and the glocalisation doctrine specifically serve as a means “through” which economic globalization is advanced, as Figure 1 depicts. By avoiding a focus on such issues as global inequality and its causes—and by focusing instead on how the glocalisation doctrine can put students in position to benefit from the global economy—the FOP policy clearly advances the interests of economic globalization and the Israeli state.

The process of making the FOP policy also connects with the other phenomena of interest here. For example, as also depicted in Figure 1, political globalization and privatization was evident

“in” the process. The Organization for Economic Cooperation and Development (OECD) and its vision for pedagogy not only served as a reference point for the FOP policy but also the OECD’s Model for Innovative Pedagogy was used to guide the analysis underlying the development of the policy. The OECD is an organization made up of highly developed capitalist countries who mission is to monitor and preserve the health of the global economy and plays a key role in promoting market-based global educational reform strategies. Moreover, marginalization was evident in the process of creating the FOP policy in that the participation and feedback of certain stakeholders was ensured (e.g., government officials, education administrators, parents, students, and representatives of the high-tech sector, finance, and industry) while that of other stakeholders was ignored (e.g., participation by teachers and Palestinians). This type of marginalization should not be a surprise, for the needs of teachers and the demands of Palestinians contravene the neoliberal approach to school management and work against the interests of the Israeli state and its position in the global economy.

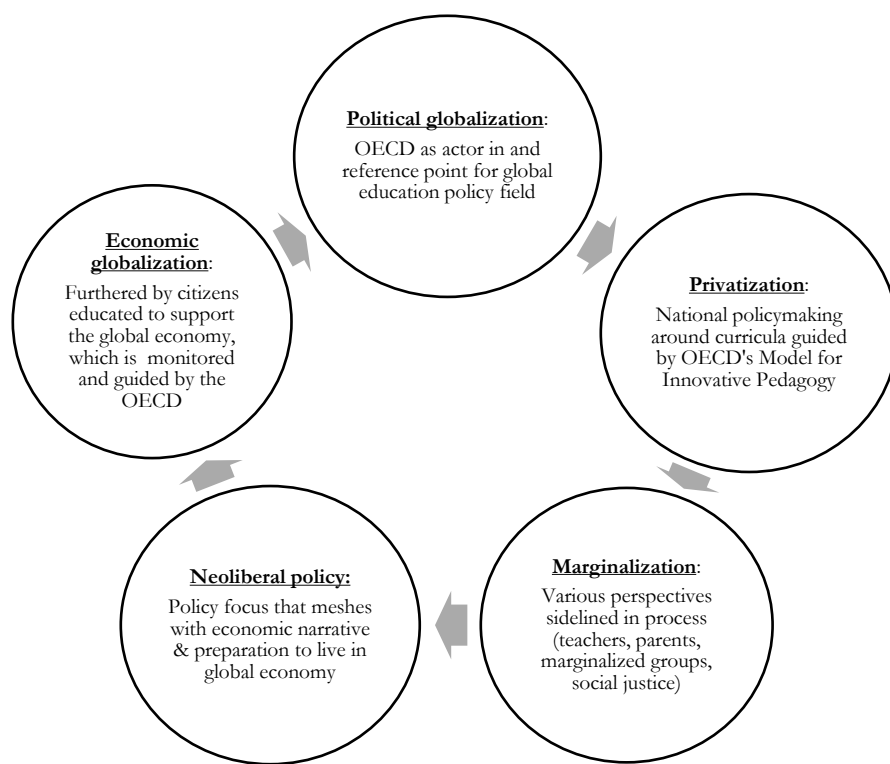


Figure 1: Dialectics of Policymaking

Note: Figure based on case of Israel in this special issue.

In sum, then, we are left with a process whereby policymaking in the context of political globalization involves international actors who contribute to privatizing the policymaking process by providing tools or frameworks that guide the thinking behind policy development. These policy development frameworks then work together with state interests to be efficient (e.g., by avoiding the [costly] needs of teachers and marginalized communities), which subsequently produce various forms of exclusion and marginalization in the process of policymaking, all while the underlying policy’s content reinforces support for individual engagement in the global capitalist economy.

Austerity and Privatization in Education. The second article, by Fátima Antunes and Sofia Viseu (2019, this issue), investigates the privatization of education in Portugal through “association contracts,” which are essentially government subsidies to private schools. Initially, in the 1980s, the purpose of association contracts was to increase access to education in areas with public school shortages, though, later, in 2013, regulations were changed thanks to right-wing support in parliament to allow association contracts anywhere, even where public schools already existed. This move to increase privatization and to place private schools near public schools not only reflected neoliberal reform logic—in that these association contracts would reduce the state budget—but also feed into dynamics of segregation and marginalization of students according to socio-economic status and ethnicity (among other dimensions), just as the privatization-focused papers in the second part of this special issue demonstrate.

While this policy clearly represents a form of privatization “in” education, it is also bound up with dynamics that allow globalization, privatization, and marginalization to operate “through” this policy. To that end, and importantly, Antunes and Viseu (2019) highlight the larger and long-term political-economic conditions that have encouraged privatization. Since the 1970s, when the state became responsible for universal public education, the government has struggled to meet the educational demand of citizens due to limited resources. This situation was made more acute by the global financial recession of the late 2000s. By 2011, the Portuguese government was forced, in the context of economic crisis, to sign a Memorandum of Understanding with the European Commission, the European Central Bank, and the International Monetary Fund. This agreement put in place policies for the structural adjustment of the economy. As the authors write, “Portugal had to make, in a very short time period, severe cuts in public expenditure. This meant reducing the scope, the resources, the capacity and the beneficiaries of public social policies in education, health and social security” (p. 9). The election of a new government in 2016 caused the issue of association contracts to surface as a point of political debate. And while this government—supported by the left-wing of parliament—decided to reverse the expansion of association contracts by again restricting them only to where public access was insufficient, we see that privatization manifested “through” the process of political debate in that the debate was, in large part, mediated and amplified by both local and multinational private media companies.

The overall dialectics of this case, which are depicted in Figure 2, thus show that the forces of political-economic globalization encouraged the growth of private schools while subsequent debate about the association contracts occurred via privatized means of communication, even when the messaging being communicated was critical of these contracts. Lastly, it should not go unnoticed that political-economic globalization has encouraged a privatization reform—which itself has the tendency to exacerbate marginalization—in the “semiperipheral” world-system context of Portugal (Bonai, 2003) that “remains one of the most unequal countries in the EU and the OECD” (Alves, 2015, p. 20, as cited in Antunes & Viseu, 2019, p. 7). As the papers in this special issue highlight, it is common for marginalized contexts to be significantly and negatively affected by political-economic globalization and the privatization that accompanies it.

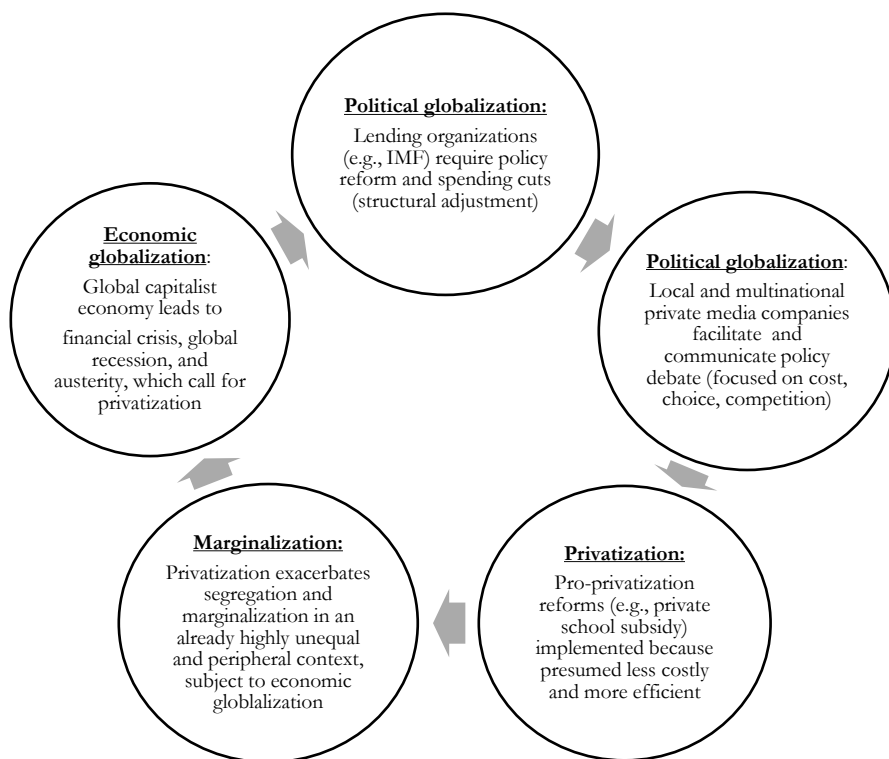


Figure 2. Dialectics of Austerity and Privatization in Education

Note: Figure based on case of Portugal from this special issue; IMF = International Monetary Fund.

Refugee Education. Another marginalized context—refugee education—is addressed in the third article of this special issue, by Hang Le. The author points out that the plight of refugees has received significant attention in recent years, with at least part of the reason being due to the Syrian Refugee Crisis, the effects of which have spilled over into middle- and upper-income countries. Another reason is the realization that humanitarian crises are far from temporary, with the average length of exile for refugees being 20 years. Within this context, refugee education began—starting in the 2010s—to receive additional attention as well because the international community recognized the need to provide education to the refugee youth of the world, of which there were 6 million as of 2016. Finally, Le (2019) suggests that the profile of education for refugees in humanitarian and emergency situations has “benefitted from the ‘leave no one behind’ spirit of the 2020 [Sustainable Development] Agenda” (p. 5).

This situation connects to the focus of this special issue in multiple ways. Most fundamentally, the article highlights that “the refugee crisis is a normal consequence of a world capitalist system based on exploitation and a Westphalian state sovereignty system based on exclusion” (Le, 2019, p. 14). While this observation has long been true, the surge in recent interest by private and non-governmental actors in refugee education as well as the evolution in the ways that these actors discuss refugee education have opened additional pathways for privatization. For example, the United Nations General Assembly declared in 2016 “an invitation to the private sector and civil society to ‘participate in multi-stakeholder alliances’ to support governments in meeting the needs of refugees (United Nations General Assembly, 2016, as cited in Le, 2019, p. 10). Elsewhere, the World Economic Forum was used by high profile political actors to call for the development of a common platform for responding to education in emergencies. The resulting platform, known as

Education Cannot Wait, subsequently received a \$100 million contribution from the Global Business Contribution for Education.

Notably, beyond privatization “through” such processes, it stands out that privatization and political-economic globalization are manifesting “in” the provision of education services to refugee populations. Le (2019) draws on extant research to reveal, for example, that “nearly half of private actors involved in Syrian refugee education are supporting a wide range of educational technology projects, from digitalizing textbooks to providing educational apps” (p. 12). Separately, the United Nations High Commissioner for Refugees is working with Facebook to provide internet access to refugees worldwide, even though refugees might not have access to other basic services. These are only a few of the examples mentioned in the article by Le.

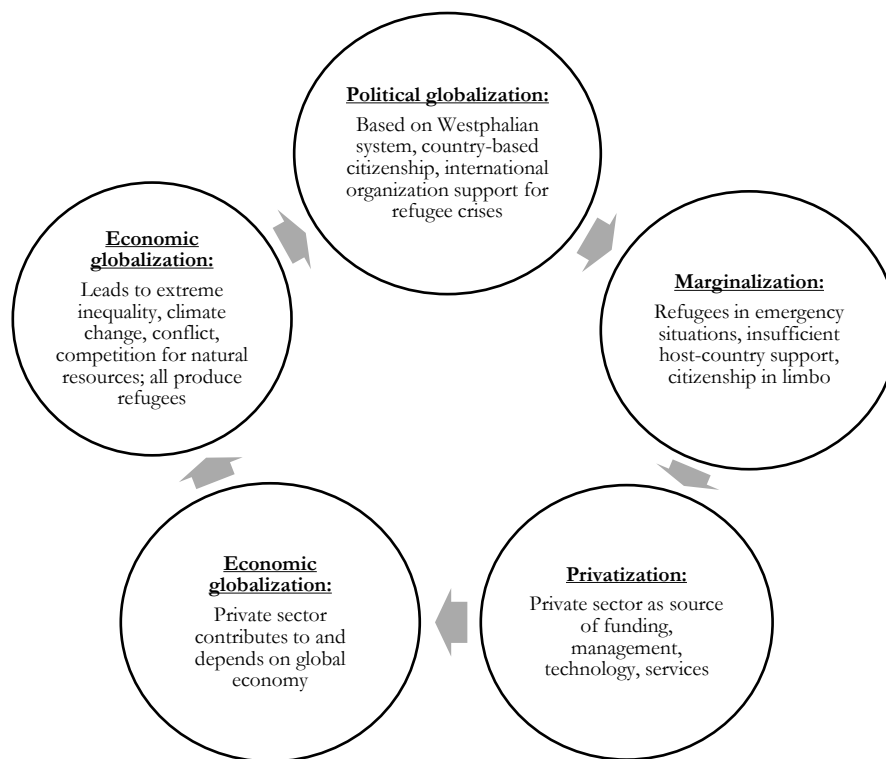


Figure 3. Dialectics of Refugee Education

Note: Figure based on paper by Hang Le in this special issue.

The larger implications of interest here—mapped in Figure 3—have to do with the dialectics of refugee education in relation to globalization, privatization, and marginalization. Among other things, geopolitical conflict, environmental destruction and catastrophe, and the inequitable global division of economic opportunity will continue to create refugees in a system that has been designed not to accommodate them. Political-economic globalization contributes to these dynamics at the same time that national governments are unwilling to absorb or adequately care for refugee populations. Unfortunately, this is unsurprising when nation-states understand their only responsibility to be their own citizens (and sometimes not even then) and when those same nation-states are already experiencing real or perceived economic crises (for which they frequently blame the “other,” such as refugees and immigrants). Thus, it is no surprise that the growing numbers of refugees around the world are increasingly seen as an opportunity for private and non-state actors

both to coordinate humanitarian responses and then to offer services directly to refugees, transforming marginalization into a site for the extraction of profit. These actors may help provide some vital services, but they also benefit from privatization “in” and “through” these processes—and they do so in ways that contribute to their legitimacy, profitability, etc. without addressing the underlying causes of the crises to which they respond. When it comes to refugee education, the links among political-economic globalization, privatization, and marginalization are only to intensify going forward, particularly in relation to the impacts of climate change and future dispossession of populations.

OECD and PISA. The fourth paper takes as its focus the OECD and its now-famous international test of student learning known as PISA, or the Program for International Student Assessment, which tests 15-year-olds on science, math, and reading skills. In spite of the concerns repeatedly raised by academics and practitioners about the detrimental effects of standardized testing (e.g., *The Guardian*, 2014), PISA data are not only used for country rankings in league tables but are used problematically to draw lessons for education policy globally (Carnoy, 2015). Moreover, as the “world’s most important exam” (Coughlin, 2013), many high-income countries have—concerningly—referred to PISA tests to guide curriculum reform and to set national education goals for over a decade. This has led to more testing, to the narrowing of the curriculum, to the diversion of time and resources into test preparation, to an obsession with international rankings, and to the increasing acceptance of the OECD’s vision of education, which prioritizes its contribution to the economy, at the expense of education’s other purposes. PISA has been implemented in ~80 countries and its data is persuasively used to generate and disseminate lessons about “what works” to improve educational quality, to such an extent that the OECD has established itself “as a kind of ‘eminence grise’ of the education policy of industrialized countries” by taking a “role as an advisor to the decision-making circles at the highest level” (Rinne, Kallio, & Hokka, 2004, p. 445).

Within these larger dynamics, the paper on PISA in this special issue focuses specifically on the context of Italy (Freitas, Chaves, & Nozaki, 2019). Here, the authors describe multiple ways that the OECD, as a major actor in the global education policy field, has contributed to various forms of marginalization in Italy through PISA. Most broadly, Italy’s low performance on PISA 2000, where it scored significantly below the OECD average in all three tested subjects, led to its marginalization in the context of the rankings (Max Planck Institute, 2002). Such rankings can have real effects as countries with low scores compare themselves with other countries and seek to borrow, or are recommended by the OECD and other actors to borrow, reforms from other contexts. This has happened in Italy. For example, the results of the 2013 PISA test indicated that, compared to South Korea, a much lower percentage of students in Italy use information technology. These results then set the stage for political reforms in 2016 that invested in and emphasized the use of educational technology (presumably provided by private companies) in order to acquire digital literacy. As has been noted recently, the way that technology is introduced and used in education systems needs to be carefully considered because it can serve to reproduce inequities across school districts in addition to further marginalizing poor communities by facilitating displacement and gentrification (Burch, 2006; Chang, 2018).

By stepping back and observing from a macro-perspective, we see how these findings are connected not only to marginalization, but also to globalization and privatization. The key is to note that, beyond managing PISA, the OECD is a membership organization that is made up of the advanced capitalist countries of the world and whose work centers, primarily, on recommending economic and social policies that will ensure the health of global capitalism. By extension, the work of the OECD, in the realm of education, is justified by the role of education in the formation of human capital, which itself is seen as a key resource that countries possess or develop as they

compete to attract capital in the context of the world economy. It can be said, then, that the economic exigencies of global capitalism provide the justification for the OECD as a global political actor in the field of education. Through the OECD, PISA functions to create a system whereby some countries are highly ranked and others are marginalized. Moreover, performance outcomes within and between nations are heavily correlated with class stratification, another form of marginalization emerging from intensifying economic inequality. This is followed by policy recommendations for improving education that generally, though not exclusively, have been grounded in neoliberal reform principles (e.g., decentralization, school autonomy with accountability, etc.). Of course, the OECD can provide advice for how to implement these reforms, in order to help countries have the best chance of managing their education systems in the interest of economic globalization. These dynamics are depicted in Figure 4.

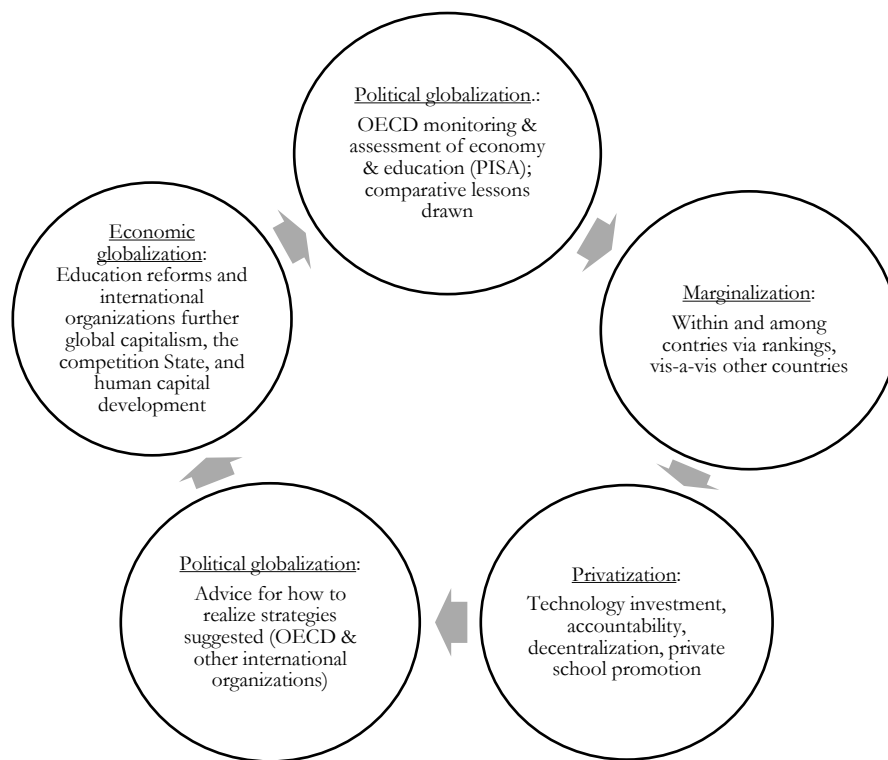


Figure 4: Dialectics of the OECD and PISA

Note: Figure based on case of Italy in this special issue.

International Non-Governmental Organizations. The fifth article, by Sam Oldham and Katherine Crawford-Garrett, address a particularly influential international non-governmental organization—namely, Teach for All. While this organization now represents a network of teacher education organizations operating in approximately 50 countries, its origins can be found in the work of Teach for America (La Londe, Brewer & Lubienski, 2015). Begun in 1990 by Wendy Kopp, the focus of Teach for America, and all subsequent iterations in other countries, has been to recruit high achieving university graduates into the teaching profession and then to work together with local school districts to place these teachers in high-poverty schools for a period of two years. The belief

is that placing recent and highly motivated university graduates in these challenging contexts will not only provide an excellent education for students but, over time, will help to address educational inequality between high and low performing schools. The entrenched nature of this form of privatization “in” education is evinced by the fact that school districts working with Teach for America are contractually obligated, first, to reserve positions for Teach for America recruits, even when there is not a shortage of teachers (Brewer, Kretchmar, Sondel, Ishmael, & Manfra, 2016), and, second, to pay a “finders fee” to the organization for each recruit (Cohen, 2015). Despite evidence on teacher effectiveness that is, at best, mixed and inconclusive (Heilig & Jez, 2010), Teach for All was born in 2007, thanks to support from the Clinton Global Initiative, in order to help replicate this model around the world.

The intentions of Teach for All participants are noble, but this has not prevented the organization from contributing to marginalization in multiple ways. It should first be noted that Teach for All participants receive minimal training—typically over the summer—before being placed in the classroom as a full-time teacher. This is important to note because Teach for All teachers typically have not pursued a university degree in education, that is, they have not gone through the multi-year training that is required of traditional public school teachers. After training, Teach for All participants are placed in high-poverty and under-resourced schools. Rather than providing the experienced and highly-trained teachers that students in such contexts need, Teach for All contributes to the reproduction of inequality and to the continued marginalization of the students in participating schools. This outcome is not only the result of the minimal training received but also by the reality that Teach for All teachers are only committed for two years, with the vast majority leaving the classroom thereafter (for statistics on Teach for America, see Donaldson & Johnson, 2011). Teacher turnover of this nature contributes to the instability that plagues high-poverty schools in marginalized contexts.

Second, and as is shown by the authors of the fifth article in this special issue, which focuses specifically on the New Zealand branch of the Teach for All network, the ideology of participants leads them to voice “global neoliberal discourses that blame students, parents, and communities” for the causes of poverty and educational inequality (Oldham & Garrett, 2019, p. 3). Unsurprisingly, this ideology is reinforced by all Teach for All member organizations given that the focus of these organizations is on addressing educational inequality via teacher recruitment, training, and placement—without any attention to the “complex web of social issues and forces that inevitably impact students’ experiences in schools” (p. 13). The implication is that “participants pass their [middle-class] beliefs and opinions on to their own students, spreading and sustaining ideas of individual self-realization among student populations who are often suffering the consequences of forms of systemic disadvantage beyond their individual control” (p. 14). And crucially, in that Teach for All member organizations have purposefully become pipelines for channeling like-minded participants into political and leadership positions within and beyond school systems, this network has become a mechanism “through” which privatization and marginalization continue to be extended on a global scale, all while spreading the ideas of personal responsibility and meritocracy that legitimize the global capitalist economy, as depicted in Figure 5.

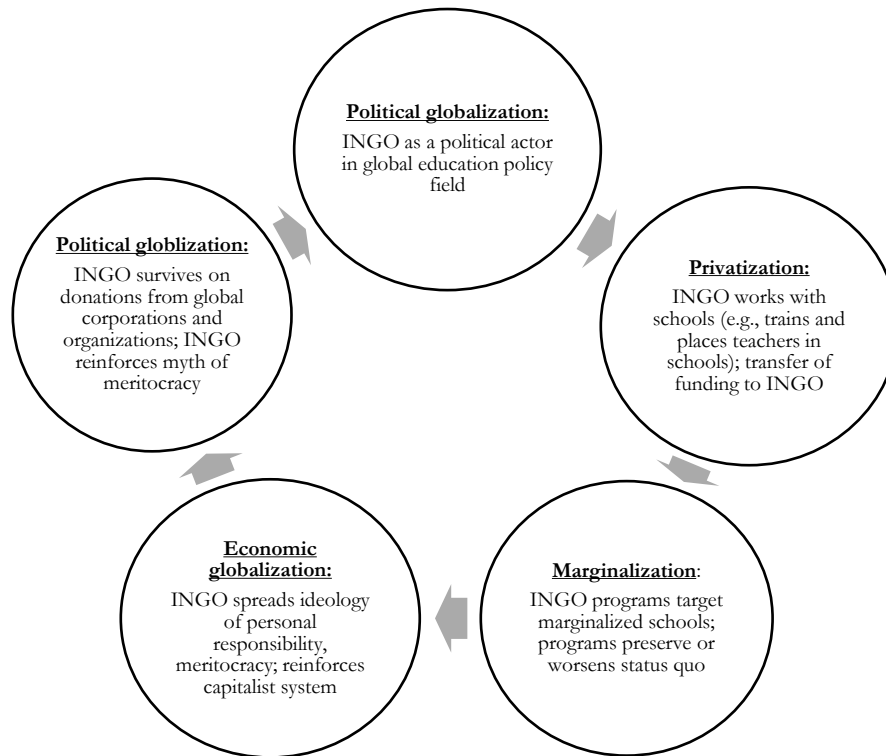


Figure 5: Dialectics of International Non-Governmental Organizations

Note: Figure based on the case of New Zealand in this special issue; INGO = international non-governmental organization.

Part 2: Globalization and Marginalization In/Through Privatization

As noted in the introduction, the seven articles in the second part of the special issue all take privatization and marginalization as their analytic focus, though they do speak to the political-economic dimensions of globalization in the framing and discussion of their research. Here, we emphasize all three dimensions while bringing them into conversation with each other, in order to underscore the important insights revealed. Three forms of privatization are examined across these articles: charter schools (in the United States), voucher policy (in Chile), and private schools that serve low-income families (in Argentina, India, Peru, and Zambia).

Charter Schools. The sixth article in this special issue investigates charter schools in the United States. While still funded and overseen by public authorities, what sets charter schools apart from traditional public schools is that they are given permission (i.e., granted a “charter”) to operate under an alternative school purpose or mission and are free from certain regulations, most notably those around teacher hiring and firing. The concept of charter schools emerged in 1988, and they were initially seen as a way to respond to community preferences and to serve as spaces for innovation and experimentation in terms of curriculum and pedagogy (Barghaus & Boe, 2011). Since that time, the choice aspect of charter schools has been emphasized by reformers who wish to introduce quasi-market policies into the public education systems in an effort to engender competition among schools, with the justification being that this will lead to improved outcomes (e.g., Moe, 2002). Notably, and concerningly, since the late 1990s, the charter school movement has taken a corporate turn as charter management organizations (CMOs) have emerged to manage networks of charter schools, a trend that has been possible thanks in no small part to philanthropic

funding at levels that exceed half a billion dollars (Farrell, Nayfack, Smith, & Wohlstetter, 2014). About half of CMOs are for-profit, and it is not uncommon for charter policy advisors and the leadership of these organizations to pay themselves hefty salaries, while also keeping teacher compensation low (Edwards & Hall, 2018; Russakoff, 2015; Saltman, 2018).

But teachers are not the only ones adversely affected by charter schools. As Frank Adamson and Meredith Galloway show in this special issue, charter schools further marginalization in multiple ways. First, and as with the other forms of privatization discussed in part two of this special issue, charter schools are typically concentrated primarily in impoverished urban areas serving students of color. This is noteworthy—particularly when, as Adamson and Galloway (2019) note, the evidence on student achievement is, at best, inconclusive—because it means that public funding is being diverted from nearby public schools that are already under-resourced in order to fund charter schools that do not have better results. Moreover, the low enrollment in public schools that results from the appearance of charter schools can then be used as a justification for closing those public schools, thereby forcing students to attend charter schools. The problem here, however, is that while charter schools are legally required to “accept and make accommodations for any student who wishes to enroll,” in reality, charter school admissions and counseling practices lead to multi-dimensional segregation (Camera, 2018). Schools may not respond to parental inquiries, may engage in unofficial screening practices to get “better” students, or may counsel parents to seek matriculation elsewhere so that they do not have to bear the higher costs of educating students with additional needs. In this issue, Adamson and Galloway (2019) infer that such practices lead, in the six districts they examine, to segregation by race, class, disability status, and English language ability. Because charter schools tend to be located in poor urban neighborhoods, they often have high concentrations of poor African American and Latino students; these schools are, however, able to enroll significantly fewer students with special needs and low levels of English language proficiency.

Despite the implications for inequity and marginalization, this model for privatization “in” education has been promoted and adapted internationally, a phenomenon which makes it a conduit for political and economic globalization more generally—as noted in Figure 6. Organizational actors such as the World Bank, the International Finance Corporation, the Brookings Institute, and the World Economic Forum, among others, have prominently featured charter schools as a best practice reform (e.g., Edwards DeMatthews, & Hartley, 2017; Patrinos, Barrera-Osorio, & Guáqueta, 2009). This is important to note because education stakeholders in the United States often do not realize the ways in which, nor the extent to which, educational trends in this country are connected to and affected by global trends. To that end, we point out that the implementation of charter school policy in the United State is advised by consulting firms with global reach (as in the case of Global Education Advisors in Newark, New Jersey; Russakoff, 2015), in addition to being a preferred investment for major philanthropists with global reach, such as the Bill and Melinda Gates Foundation, the Walton Family Foundation, the J.P. Morgan Chase Foundation, and the Chan Zuckerberg Initiative (Saltman, 2018). While these corporations and their associated foundations may not profit directly from charter schools (unless they are part of the movement to invest in charter school real estate), their association with these schools does help to improve their image, which has financial implications for these corporations. At the same time, this relationship helps to enhance the appeal and reach of the charter school reform model, preserving its potential as an intervention in other marginalized contexts around the world that are likewise affected by the boom and bust of the capitalist economic system from which these same corporations benefit.

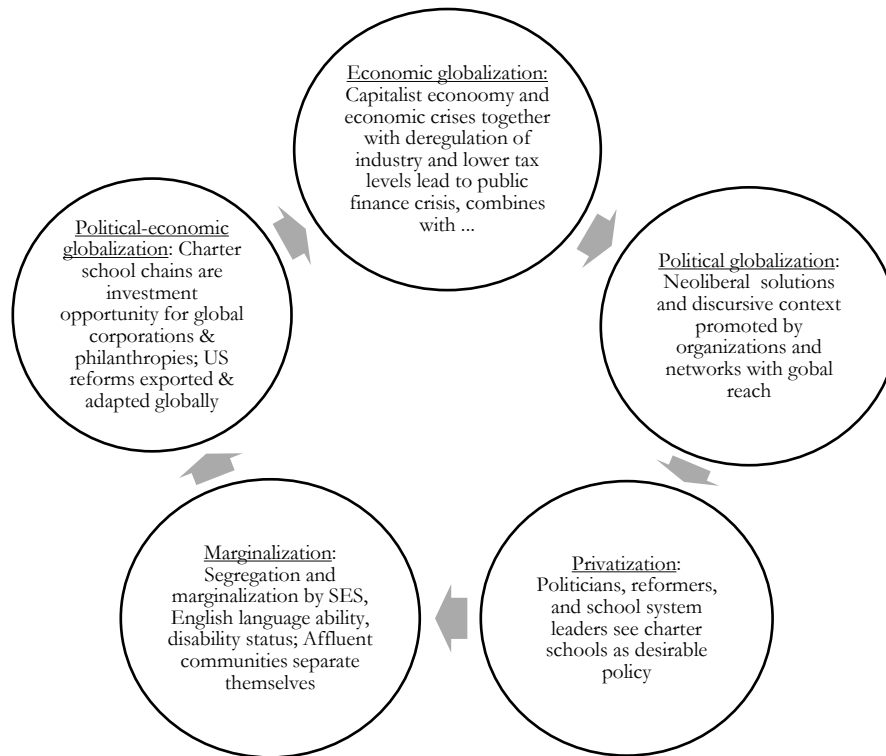


Figure 6. Dialectics of Charter Schools

Note: Figure based on case of the United States from this special issue.

Voucher Policy. The voucher experiment in Chile is perhaps the most famous example of educational privatization in the world—and it is the focus of the seventh article in this special issue, by Adrián Zancajo. As with charter schools, the reform, implemented in 1981, sought to introduce competition into the education system. To do this, the government deregulated both private and public schools to allow them to tailor their policies and practices to attract students. The military government of the time eliminated the teachers’ union as a bargaining unit, and by 1983 “even public schools, meaning those schools run by municipalities, could hire and fire teachers without regard to tenure or a union contract” (Carnoy, 1998, p. 317). An additional move was to give schools permission not to follow the national curriculum or national standards (though most schools continued to follow them; Carnoy, 1998). Schools were then funded on a per-pupil basis by the government. On the demand side, this arrangement was supposed to provide parents with the ability to put pressure on schools, in that schools would operate under the threat of losing students if they did not meet the expectations. On the supply side, the idea was that “this competitive environment ... will provide the necessary incentives to schools to deliver a quality education for all, or conversely force them to exit the market due to lack of demand and financial resources” (Zancajo, 2019, p. 7).

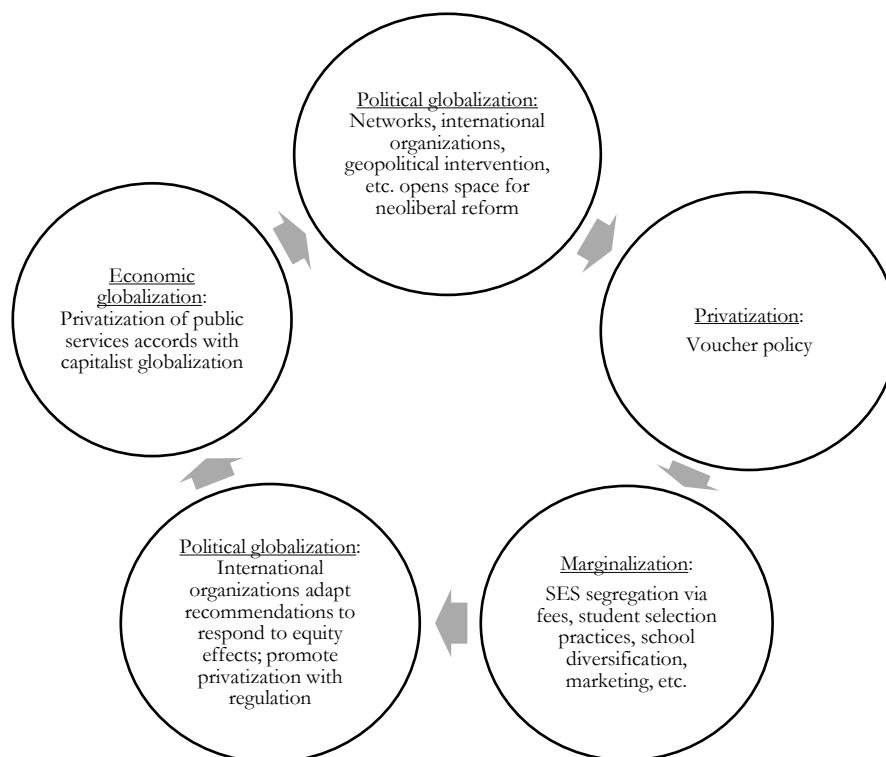


Figure 7. Dialectics of vouchers

Note: Figure based on case of Chile from this special issue.

Many issues have surfaced with the voucher plan in practice. National test scores for all students decreased in the decade after the reform passed, a trend that reversed only once a democratically elected government increased spending per pupil and provided technical assistance to low-income schools in the 1990s (Carnoy, 1998). Outside of test scores, and as Zancajo (2019) highlights in this issue, there are a variety of practices at the school level that contribute to segregation and marginalization. Of course, fee levels contribute to segregation based on socioeconomic status, but Zancajo (2019) also reveals that school principals rely on “a broad variety of methods utilized to carry out student selection, as well as to promote auto-exclusion among socioeconomically disadvantaged students” (p. 16). Examples include application fees, the requirement to participate actively during the application process, and information sessions where schools make it known that “the school does not have the will or capacity to enroll children from low socioeconomic backgrounds or with special needs” (p. 17). Separately, schools contribute to “exclusion through diversification” (p. 19) by developing different profiles and by using a range of marketing strategies in order to distinguish themselves from other schools and in order to attract families that align with their target market.

Interestingly, both the history and the future trajectory of this policy connect with political-economic globalization as we have defined it. Historically, the voucher policy is a direct extension, first, of the coup carried out by the United States in 1973, when the democratically elected socialist president, Salvador Allende, was overthrown and executed. Second the voucher policy is the manifestation of the economic thinking that was promoted in Chile since 1956, when the United States Agency for International Development began a program to finance graduate studies at the University of Chicago so that they could be trained in neoclassical economics with Milton Friedman

and his colleagues. The beneficiaries of these scholarships would later author the economic plan that was adopted by the military dictatorship in Chile, in addition to assuming leadership positions that would allow them to enact drastic economic reforms with dire consequences for the Chilean population (Klein, 2007). More recently, what is fascinating is that neoliberal international organizations have recommended revisions to the Chilean voucher model, after decades of holding up it up as an exemplar for the world. Here, Zancajo (2019) notes that the OECD, the United Nations, and even the World Bank have highlighted the negative stratification and segregation effects of vouchers and other schemes to increase competition among schools. However, as Figure 7 notes, the solution from the perspective of these organizations has not been to abandon such schemes but rather to argue that they need to be better regulated “to avoid discrimination and ensure that all providers pursue the public interest” (Zancajo, 2019, p. 23). However, as the articles in the next section demonstrate, this suggestion is more difficult to realize than one might think due to the difficulty of regulating private school admissions practices, the low capacity of many governments to monitor private schools, and the fact that there is a disincentive to attempt regulation when governments know that they do not have the resources necessary to address the underlying causes of privatization.

Low-Fee Private Schools. The final five articles in this special issue connect with the phenomenon of low-fee private schools (LFPS). These are private schools that are targeted to—and that tend to have fees that are more affordable by—low- and lower-middle class families, compared with those fees charged by costlier private schools, though to be sure LFPSs are still out of reach of the poorest of the poor, as the articles here demonstrate (see also Lewin, 2007). While this phenomenon is gaining ground in many countries around the world (Verger, Fontdevila, & Zancajo, 2017), the authors in this special issue focus on Argentina, India, Peru, and Zambia. While Figure 8 depicts the overall dialectics of LFPSs within the context of globalization, one thing that stands out is their shared origins in India, Peru, and Zambia.² In each of these cases, LFPSs emerged organically, rather than being the result of an explicit policy push either by the national government or an international organization. One of the key driving factors in each case has been the context of economic crisis in the post-1970s period, with these crises being accompanied by financial intervention from the World Bank and the International Monetary Fund through structural adjustment loans that required reductions in government spending, in addition to liberalizing, deregulating, and privatizing the economy. The combination of economic crisis together with public spending cuts, urbanization, and population growth meant that peripheral and marginalized areas of metropolitan centers did not provide the necessary access to public education. The result has been that individuals have taken it upon themselves to open LFPSs in order to serve local demand.

Unsurprisingly, in the absence of meaningful (or, in some cases, any) regulation or oversight by the government, LFPSs are connected to and have contributed to marginalization in multiple forms. First, the lack of jobs either in the public or private sector has driven enterprising individuals to start LFPSs out of desperation. But these schools do not solve the problem of precarity for school operators, as many of them are barely able to survive themselves, let alone make a profit. As has also been documented elsewhere, there is a mutual dependence between these schools and the communities where they are located: the schools offer an education where public education does not exist or is over-crowded, and in return parents pay what they can (Edwards, Klees, & Wildish, 2017).

² Though Lafleur and Srivasta (2019, this issue) do not conceptualize their research as an investigation of LFPS, we include their paper here because it connects with this trend and shares a number of characteristics, such as the focus on private schools that serve marginalized students from low- and lower-middle class backgrounds.

Second, and as with other forms of privatization discussed earlier, LFPSs engage in marketing to distinguish themselves from other private schools and from the public sector in addition to setting fee levels and enacting student selection practices that will allow them, to the extent possible, to admit more desirable students in terms of economic class, behavior, disability status, etc. One tragedy of this situation is that many extremely poor families are left without any options because they cannot afford any LFPS and there is no public school nearby—or else they must choose between a LFPS and basic necessities like food, as the Zambian case herein documents. And when they are able to afford a private school, their children are often demeaned and labeled with pejorative language due to their marginalized background (see Lafleur & Srivastava, 2019, this issue). Third, teachers themselves are marginalized through LFPS because staying in business often means cutting or “sacrificing” the salaries of teachers (Balarín, Fontdevila, Marius, & Rodriguez, 2019, this issue). Yet what is fascinating is that LFPS operators do not see themselves as contributing to marginalization (as noted by Mond & Prakash, 2019, this issue), even though they are frequently former public-school teachers or principals themselves (see Edwards, Okitsu, & Mwanza, 2019, this issue), because they believe they are providing a valuable alternative to low-quality public schools—even when they are shown evidence that LFPSs do not produce better results (Mond & Prakash, 2019). Fourth, and finally, LFPSs likewise contribute to the marginalization of public schools because they often siphon off the relatively more privileged students, except in those cases, such as the Philippines, where public schools have been able to maintain a good reputation and where they respond to the preferences of middle class families (Termes, Edwards, & Verger, forthcoming).

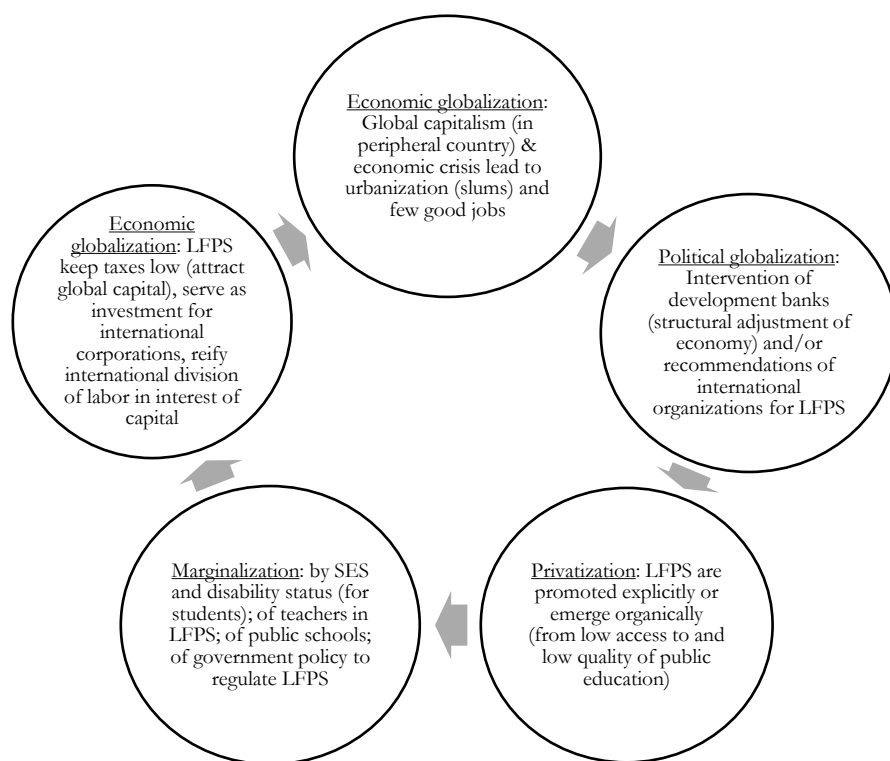


Figure 8. Dialectics of Low-fee Private Schools

Notes: Figure based on cases of Peru, Zambia, India from this special issue. See text for discussion of differences with Argentina. SES = socioeconomic status, LFPS = low-fee private schools.

As for the dialectical nature of LFPSs, one need not only recognize the political-economic dynamics mentioned above related to economic crises, but also the fact that the global actors have picked up on this model and are actively promoting it. These include United Nations organizations (e.g., the World Bank; the United Nations Educational, Scientific and Cultural Organization), bilateral aid organizations (e.g., the United States Agency for International Development, the Department for International Development of the United Kingdom), international corporations (e.g., Facebook, Pearson Corporation), think tanks (e.g., the Brookings Institution, the Cato Institute), and venture philanthropists, to name a few (Edwards, Klees, & Wildish, 2017). The emphasis on LFPSs can be seen as part of the push for education policies that attempt to improve educational access and quality not through the strengthening of public education, but rather through the establishment of public–private partnerships (Verger, 2012), often without fully grasping or considering critically the dynamics of how these schools operate. The lack of attention to these dynamics may be due, in many cases, to the fact that private actors at the national and global level are seeking to make a profit from LFPSs by investing in chains of LFPS schools, particularly in Ghana, Liberia, and Peru, among other countries (Global Campaign for Education, 2016).

Yet other actors, such as the World Bank, seem to be interested in the LFPS model, at least when it comes to their publications if not their loans, because it aligns with their neoliberal reform orientation. This would explain the reason for which the World Bank promotes the version of LFPS found in Argentina (Patrinos, Barrera-Osorio, & Guáqueta, 2009), even when the origins and logic of the reform have not sought to create the kind of competitive dynamics that the World Bank believes to be good for education (see Moschetti & Snaider, 2019, this issue). Interestingly, this same phenomenon can be observed in the case of India. Lafleur and Srivastava (2019, this issue) note that the Right to Education Act of 2009 sought to respond to a lack of space in government schools by requiring that private schools reserve 25% of their seats for students who cannot afford the fees. This kind of policy accords with the World Bank’s more recent emphasis on mitigating the segregationist tendencies of privatization, and, as such, has been highlighted as a best practice (see, e.g., World Bank, 2014). These examples of the dialectics of LFPS not only highlight the ways that globalization and privatization function “through” LFPS but also the ways that such troubling trends can be picked up, reframed, and sold or promoted for the benefit of global actors without attempting to address the driving forces behind such phenomena.

Implications “Of” and “For” the Globalization-Privatization-Marginalization Nexus

The implications “of” the globalization-privatization-marginalization nexus have been extensively addressed and documented in the previous sections—both in the presentation of the conceptual framework and in the discussion of each case. The main contribution has been to show the ways that marginalization is an effect of globalization and privatization, but also that marginalization further effectuates globalization and privatization, in turn. However, beyond this overarching point, a series of other implications “of” this nexus can be enumerated.

1. **Policymaking processes has been privatized in various ways.** For example, in Israel, the OECD’s Model for Innovative Policy was used to guide analysis of stakeholder feedback, while in Italy the OECD’s testing system and research findings both identify weaknesses and provide policy recommendations. In Portugal, the debate around association contracts (that is, public subsidies for private schools) occurred through privatized media, even when critical perspectives were being offered. In the realm of refugee education, private corporations are financing and managing the platforms and partnerships through which

humanitarian responses are being designed and then implemented, in addition to profiting from service provision. And in New Zealand, as well as the other 50 countries where Teach for All operates, the school system has at least partially privatized teacher training and professional development by entrusting these responsibilities to the local branch of an international non-governmental organization.

2. **Capitalist globalization and privatization reforms reproduce inequalities.** None of the reforms mentioned here can reasonably be thought to contribute to more socially-just outcomes. Indeed, the opposite is true, as has been documented. In the context of capitalist globalization, countries are guided by efficiency- and finance-driven reforms in an effort to save money while boosting test scores with the ultimate goal being to improve their human capital in the service of the economy. In this context, equity-driven reforms, let alone more progressive, or radical approaches to education that might build capabilities for transforming the political-economic systems and processes responsible for producing inequality, are marginalized. Such approaches neither serve the interests nor align with the conditions that are driving education reform in the contemporary context of globalization (Carnoy, 1999).
3. **Policies that emerged in the past for other reasons—even equity-related ones—have been inscribed with new logics that reflect the current global discourse.** For example, the policy that provides support to LPFS in Argentina began in the 1940s as a way to deal “with job instability affecting teachers in private schools by allocating public funds for those that proved unable to afford teacher minimum wages” (Moschetti & Snaider, 2019, p. 5). In more recent years, politicians have used neoliberal concepts like accountability and competition to characterize the purpose of the policy. It has been suggested that they do this “as a means of legitimation and as a way to symbolically ‘update’ the policy to current global discourse” (Moschetti & Snaider, 2019, p. 19). Likewise, in Portugal, public subsidies for private schools were initially provided because the state could not afford to offer universal access to public education. However, recent debates about these subsidies have emphasized their ability to reduce state expenditure and to ensure that funds are better managed. Lastly, in Peru, Legal Decree 882 was passed in 1996 with the justification that it would allow for-profit investment in higher education “in the context of the government’s limited financial and institutional capacity to increase the number of public universities” (Balarín et al., 2019, p. 11). Yet this same policy has subsequently provided the legal basis for the entry and operation of LFPS at the K-12 level, where the government also struggles to provide sufficient access.
4. **The claims of privatization proponents do not materialize in practice.** As the contributing authors argue, none of the privatization forms examined in part 2 of this special issue can credibly claim to offer better results than public schools when controlling for background factors. This means that the trend of privatization of education that we are witnessing across the world—and the concomitant shift in resources from public to private hands that accompanies it—is happening without even the justification that these forms of privatization are producing higher student achievement. To be sure, proponents of privatization would debate this point and would marshal evidence in their favor. But this is not surprising as the production of evidence and the framing of debates is one of the areas in which private actors excel, as this special issue reveals. Moreover, as the paper by Mond

and Prakash (2019) shows, private providers do not believe evidence of their ineffectiveness even when they are directly presented with it.

5. **International organizations tend to support (or do not challenge) economic globalization.** A great many international organizations and actors are mentioned across the papers in this special issue—and none of them can be said to challenge the forces of economic globalization. In part, this may be a function of theme of this special issue. But we suggest that this is also a function of the fact that it is extremely difficult for radical or even progressive international organizations to survive in the current context of capitalist globalization. It is no surprise that we see the engagement of corporations and other organizations that profit from capitalist globalization, such as the World Bank. And liberal non-governmental organizations, such as Teach for All, Save the Children, etc. are able to maintain their solvency due to donations from corporations and philanthropies. We also suggest that these latter organizations are amenable to providing these donations because the recipient organizations are helping to address the ills of the global capitalist system from which the donors benefit. Certainly, there are other kinds of international actors that have more progressive if not radical orientations—such as civil society networks or transnational solidarity and activist movements—but the point here is that these actors are not likely to be major players in the global education policy field. They tend not have the financial or institutional resources necessary to engage in the processes or the events through which national education policies or the global educational agenda is negotiated. That said, we highlight that this is an area for future research and activity.
6. **Direct policy borrowing between countries has been replaced by assistance from international organizations.** There is a long history of politicians borrowing lessons or ideas from other countries, and this can still happen. But the cases in this special issue suggest that policy learning and the identification of best practices tend to be mediated by international organizations such as the World Bank, the OECD, and similar “intermediary” organizations who traffic in research, knowledge production, and consulting services (Auld & Morris, 2014; Scott & Jabbar, 2014). Building on point five, above, we argue that these lessons are likely to serve the interests of international organizations and other for-profit service providers (Edwards, 2013; Steiner-Khamisi, 2015).
7. **The local level remains central to the experience and meaning of global education policies.** With all the focus on capitalist globalization and international actors, we must remain cognizant of the role and dynamics at the local level, for they constitute a key node in the dialectical circuits mapped earlier—and thus they represent an essential moment or space where global policies are brought to life, are transformed, or are rejected. The articles in this special issue demonstrate that global and national agendas will impact the local level only if they meet at least one of a number possibilities. Specifically, global and national actors must (a) be able to impose their will (as in the case of the military dictatorship in Chile); (b) align with the interests of local populations (as in the case of charter schools in the US, where many families are frustrated with traditional public schools, or else the policy will be mediated by everyday schooling practices and interactions in ways that alter the intended functioning of the policy, as in the case of the Right to Education Act in India); (c) circumvent oppositional constituencies (as in the case of Israel, where Palestinians were not included in the policymaking process); or (d) sell the policy in a way that doesn’t engender

resistance (as in the case of Peru). Otherwise, globally popular policies will not be enacted at all, will be adapted to local conditions, or will only be enacted symbolically.

In concluding this section, we wish to offer a final two implications. These differ from those mentioned above in that they are implications “for”, rather than “of”, the globalization-privatization-marginalization nexus. By this, we mean that these implications are not consequences of the application of the political-economic framework elaborated at the outset, but rather that they are issues that have arisen and that can and should inform how we think about that framework.

1. **Culture remains a mediating force that complements a political economy perspective.** We make this point here because we do not wish for our adoption of a political economy perspective to be mistaken for a lack of regard for the importance of culture and context when it comes to understanding how capitalist globalization and various forms of privatization are playing out. To the contrary, we seem both perspectives as necessary. Moreover, this attentiveness to the local cultural context is essential for grasping the ways that the *processes* of privatization and marginalization manifest. As Stambach (2016) recently noted, “culture” can be conceptualized as “a way of doing things” while the “local” can be “seen as a relational space for enacting and interpreting social worlds” (p. 491). As the forces of globalization generally and global education policies specifically enter into and interact with local cultural contexts, they will necessarily be affected by the local ways of doing and understanding things. The case of Argentina in this special issue speaks to this consideration when it notes that the guiding norms for the government’s LFPS policy have been rooted in local concerns and contextual constraints, with the implication being that these norms and conditions have “‘immunized’ the Argentine education system from the later global diffusion of pro-market discourses and policy paradigms” (Moschetti & Sneider, 2019, p. 5; see also Beech & Barrenechea, 2011). Elsewhere in the special issue, we see how cultures of racism and classism have led, in the case of Israel, to the exclusion of Palestinians in the policymaking process and, in the case of the United States, to the creation of pockets of affluent exception in that that more well-off families have created separate political spaces within marginalized school districts. Adamson and Galloway (2019) label these spaces as “protectorates” within larger school district boundaries and point out that they “serve a real purpose in dividing communities along class and race lines and preventing the equitable distribution of resources across all sectors, including education” (p. 25). Thus, globalization and privatization trends can be expected to lead to increased marginalization, but the way this happens will vary based on culture and context.
2. **Networks and assemblages intersect with political-economic structures but do not function independently of them.** The conceptual framework presented in this essay is grounded in a focus on political-economic structures, but this does not mean ignoring the influence of networks or the ways that different constellations of actors and objects come together. The cases in this special issue make this clear. For example, the network of the Chicago Boys was instrumental in bringing about neoliberal educational reform in Chile, but their rise and ability to be influential was dependent on the structures of U.S. foreign aid (which funded their study at the University of Chicago) and the military dictatorship that put them in positions of power. More recently, while private actors have made incursions into the world of refugee education, this has been facilitated by, for example, the structures of the United Nations and the World Economic Forum, both of which have served as spaces in and through which networks of political and private actors have collaborated to privatize

refugee education, as Hang Le (2019) describes. In New Zealand, Oldham and Crawford-Garrett (2019) show that the Teach for All network operates within the structure of the beliefs of the middle class. Lastly, in the case of Italy, the authors document the ways that the production, circulation, and interaction of PISA results is very influential; however, this paper also underscores that the temporary assemblages through which knowledge products and knowledge actors (i.e., both the producers or the consumers knowledge) come together are set in motion by and are constrained by the organizational, economic, and geopolitical structures within which they are located. As such, we do not believe that scholars have to choose between political-economic frameworks, on one hand, and network- or assemblage-focused approaches, on the other hand. These latter approaches have gained in popularity in recent years (e.g., Ball, 2016; Gorur, Hamilton, Lundahl, & Sjödin, 2019)—the task going forward is to combine their conceptual emphases to better understand such phenomena as globalization, privatization, and marginalization.

Conclusions

In concluding, we point to the need to think beyond capitalist globalization in its current form, as that is the driving force behind the dialectics that we have documented here. The consequences of this kind of globalization suggest to us the need to explore alternative globalization(s). There doesn't need to be only one 'globalization', but it seems to us that it (they) would do well to be based, first, on a different economic model, and one that is more environmentally sustainable; second, on a different notion of the divide between what is public, what is private, how to organize ourselves democratically, and how to engage with or transform the state (e.g., Edwards, 2019; Edwards & Klees, 2015; Griffiths & Millei, 2013; Klees, 2017; Muhr, 2013; Tarlau, 2019); and third, on different onto-epistemological perspectives that get away from Enlightenment thinking, the four forms of discrimination that enabled it (racism, sexism, Christian supremacy, and epistemicide), and its associated methodological tools (Maldonado-Torres, 2007, 2014; Grosfoguel, 2013; Edwards, forthcoming). It is not that Enlightenment thinking and methods cannot be used for good, only that they are but one way of approaching the world, one that has been co-opted in the service of capitalist globalization and the merchants of privatization. There are other perspectives that can serve as the basis for knowing and relating to the world and to each other (Silova & Rappleye, forthcoming). A patchwork of these alternative knowledge systems could serve as the basis for global communication and interaction that preserves rather than destroys the world in which we live (de Sousa Santos, 2007). Individually and together, the suggestions made here would alter the globalization-privatization-marginalization nexus, disrupt the dialectics among these phenomena, and provide possibilities for creating a world free from the marginalizations mapped in this essay and the other articles of this special issue. In briefly mentioning the above suggestions, we hope that these various possibilities will be taken up and explored not only in subsequent scholarship but also in lived experiments from which we can further learn.

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