Charl C Wolhuter

THE GLOBAL SOUTH AND COMPARATIVE AND INTERNATIONAL EDUCATION

A Leitmotif

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AVARSITY

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Research justification

There is currently widespread criticism within the realm of comparative and international education against the prevailing Northern hegemony. This critique is evident across various strands in the current discourse, including opposition to the imposition of a singular development model, scepticism towards foreign aid and international agencies, anti-globalisation sentiments, disapproval of neoliberal economics and its impact on education, calls for the decolonisation of education and the field itself, criticism of racism in education, appreciation for indigenous knowledge systems and allegations of scholars from the Global South facing an unequal playing field. Contrary to this perceived Northern hegemony, there is a notable emergence of the Global South on the global stage, encompassing factors such as geography, demography, socio-cultural dynamics, economic and political influence, as well as religious and philosophical perspectives. This rise extends to the realm of education. In the interest of social justice, aligning with the philanthropic ideals of comparative and international education and reflecting the contemporary global landscape more accurately, it is imperative to grant the Global South its rightful place in the field. The aim of this book is to survey all these criticisms against the present state of the field of comparative and international education and to lay the basis for the evolution of the next phase in the historical development of the field, characterised by the affirmation of the Global South. The presented research in this literature employs a method that involves both a survey and critical analysis of existing literature and discourse within the field of comparative and international education.

This scholarly book originates from the Research Unit of Human Rights Education in Diversity at North-West University, South Africa, where the author is affiliated. This book is grounded in the Creed for Human Rights. From this perspective, this book advocates for a new phase in the historical development of the field, with a focus on advancing the affirmation of the Global South as a central moral foundation. The author envisions that this shift will represent a significant advancement in comparative and international education, propelling it to an unprecedented stage of value and importance.

The method of research presented in this literature is a critical survey of the current literature and discourse in the field of comparative and international education. The author declares that the material in this book represents original research and that there is no plagiarism in the book.

Charl C Wolhuter, Research Unit Education and Human Rights in Diversity, Faculty of Education, North-West University, Potchefstroom, South Africa.

Contents

Abbreviations and acronyms, figures and tables appearing in the text and notes

List of abbreviations and acronyms

AIAN	American Indian/Alaska Native
AERA	American Educational Research Association
BAICE	British Association of International and Comparative Education
BIPOC	black, indigenous and people of colour
CERC	comparative education research centres
CESE	Comparative Education Society in Europe
CIES	Comparative and International Education Society
CIRE	Comparative and International Research in Education
GDP	gross domestic product
GERM	global education reform movement
GNI	gross national income
ICT	information and communication technology
IDA	International Development Association
IEA	International Association of Education Achievement
IGOs	intergovernmental organisations
IKSs	indigenous knowledge systems
ILO	International Labour Organization
IMF	International Monetary Fund
JICA	Japan International Co-operation Agency
MDG	millennium development goals
NGO	non-governmental organisations
NHPI	Native Hawaiian/Pacific Islander
NSFAS	National Student Financial Assistant Scheme
OECD	Organization for Economic Co-operation and Development
OISE	Ontario Institute for Studies in Education
PIRLS	Progress in Reading Literary Study
PISA	Programme for International Student Assessment
SABER	Systems Approach for Better Education Results
SACHES	Southern African Comparative and History of Education Society

SDGs	sustainable development goals
SIG	special interest group
SUNY	State University of New York
TIMSS	Trends in Mathematics and Science Study
UK	United Kingdom
UN	United Nations
UNDP	United Nations Development Programme
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNICEF	United Nations Children's Emergency Fund
USA	United States of America
USAID	United States Agency for International Development
USSR	Union of Soviet Socialist Republics
WCCES	World Council of Comparative Education Societies
WTO	World Trade Organization

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Biographical note

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Charl C Wolhuter studied at the University of Johannesburg, the University of Pretoria, the University of South Africa and Stellenbosch University, South Africa. He obtained a Doctor of Philosophy degree (PhD) in comparative education at Stellenbosch University. He was a junior lecturer in history of education and comparative education at the University of Pretoria and a senior lecturer in history of education and comparative education at the University of Zululand. Currently, he is a comparative and international education professor at the Potchefstroom campus of the North-West University, South Africa. He has held visiting professorships at, among others, Brock University, Canada; Driestar Pedagogical University, the Netherlands; the University of Crete, Greece; Canterbury Christ University, United Kingdom; the University of Joensuu, Finland; the University of Queensland, Australia; the University of Modena and Reggio Emilia, Italy; Mataj Bel University, Slovakia; Borys Grinchenko Kyiv Metropolitan University, Ukraine; University of Zhengzhou, China; the University of Namibia, Namibia; the University of the Western Cape, South Africa; the Education University of Hong Kong, Hong Kong; Eberhard Karl University of Tübingen, Germany; the University of Latvia, Latvia; the University of Ljubljana, Slovenia; the University of Tarapaca, Chile; and San Martin University, Argentina. He is the author of various books and articles on the history of education and comparative education. He is also the assistant editor of the journal *Comparative Education Review*.

Chapter 1

Comparative and international education: History, challenges and future

Abstract

This is the introductory and orientation chapter to the volume. The historical trajectory of the evolution of the field of comparative and international education is reconstructed. This historical survey culminates by the identification of five lacunae in the field at this point in time. The most pressing challenge in the field is that of Northern hegemony. Indeed, this chapter suggests the construct of criticism against Northern hegemony in comparative and international education and in education in the contemporary world as the defining feature of the current era in the field. This criticism against Northern hegemony is evident in the following strands, detectable in the scholarly discussion in the field: criticism of the imposition of one model of development; criticism of foreign aid and of international agencies; anti-globalisation; criticism of neoliberal economics and its impact on education; calls for the decolonisation of education and of comparative and international education; criticism of racism in education and in comparative and international education; an appreciation of indigenous knowledge systems (IKSs); and allegations that scholars of the Global South find themselves on an unequal playing field. The author pits

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the rise of the Global South in the contemporary world and the global education project against this Northern hegemony. The thesis of this book is to argue for the affirmation of the Global South as the next logical and required phase in the evolution of comparative and international education.

Introduction

In the current era in world history, characterised by a massive education expansion project (see Baker 2014; Wolhuter 2021), undergirded by boundless trust in the value of education to be an instrument of change in society and in the lives of individuals (see Lutz & Klingholz 2017), a too often overlooked fact is that the community of scholarship best equipped – because of its object of study and method of study – to offer advice to this education expansion and reform project, is that of comparative and international education. In this book, it is contended that this field of scholarship currently has a preposterous structure. This preposterous structure comes to the fore in a variety of strands of criticism that scholars in the field are expressing against the field. These strands of criticism, which can be subsumed under the construct of 'criticism against Northern hegemony', comprise the following: criticism against the enforcement and exclusive validation of one model of development; criticism against foreign aid and international agencies; anti-globalisation (at least in its present manifestation); criticism against the neoliberal economic revolution and its introduction in the education sector; calls for the decolonisation of education and of comparative and international education; criticism against racism in education and in comparative and international education; an acknowledgement of IKSs; and objections that scholars of the Global South find themselves operating on an unequal playing field (Wolhuter 2023, p. 2238).

This construct, 'criticism against Northern hegemony in the field', captures a significant amount of what leading researchers of comparative and international education are currently engaged with, so much so that it can be described as a defining feature of the current phase in the historical development of comparative and international education. In contrast to Northern hegemony (in comparative and international education and beyond) stands the rise of the Global South. The thesis of this book is that the affirmation of the Global South constitutes an élan for the field and should be the signature feature of the next major epoch in the historical development of comparative and international education. The main lines and parameters of such a (possible and desirable) development are discussed. As a framework to understand the current criticism against Northern hegemony in the field, this first chapter offers an outline and critical reflection of the historical trajectory of comparative and international education as a scholarly field. From this survey, the scope, significance and value of the field will become apparent, as will the deficiencies in its current state.

Historical evolution of comparative and international education

In the historical evolution of comparative and international education, it has been customary to distinguish between seven phases (see Noah & Eckstein 1969; Paulston 1977; Wolhuter, Espinoza & McGinn 2022, pp. 2–3). These phases take the landmark publications of Noah and Eckstein (1969) for the first five phases and that of Paulston (1994) for the last phases, as reference points. In recent times, there has been a heartening re-kindling of interest in the historical evolution of the field. Evidence of this includes Carnoy's (2019) publication of its history at Stanford University; the Routledge Series of great nineteenth- and 20th-century scholars in the field (tellingly, the only volumes that have been published thus far deal with Northern territories such as North America [Epstein 2021] and Britain [Phillips 2020]); Masemann, Bray and Manzon's (2008) edited volume of the World Council of Comparative Education Societies (WCCES) and its forthcoming follow-up book (Bedi et al. 2023); Epstein's edited volume of the history of the Comparative and International Education Society (Epstein 2016); the publications of Noah and Eckstein (1969) and Paulston (1994); and the seven phases derived from these publications remain the major reference points for the portrayal of the global path of the field of comparative and international education.

These phases should be conceptualised not as a sequence of mutually exclusive phases, one substituting the previous, but as a continuous growth or broadening of the field. That means what took place during each phase, from Phase 1, is still present today. Each phase represents a broadening or expansion of themes, methods, theoretical frameworks and objectives of the field. This chapter and this book will also suggest joining the dots of a number of salient trends in the field today to develop a construct to describe the present state of the field as Phase 8. Finally, this chapter and this book will also envision Phase 9 to dawn in the near future.

Phase 1: Travellers' tales from times immemorial

Comparison is a typical, unique and universal human activity. It can therefore safely be surmised without fear of gainsay that the very earliest human beings, as soon as they established contact with alien communities, societies and cultures, be it in the course of migration, war, trade or whatever other reasons, commenced to compare their own societies, communities and cultures, and also their ways of raising children, with that of others. Similar comparisons can be found in the public and social media today. A typical modern-day example is the book by Karen Cronjé (2018), *There Goes English Teacher: Lessons from a Globe-Trotting Educator*, in which a South African teacher tells about her experience of teaching English in a school in Korea. These travellers' tales are generally incidental, cursoric, not systematic, haphazard and by no criterion scientific; therefore, this phase can be classified as a prescientific phase of comparative education. In the current period of the early 21st century, social media is certainly set to supply a steady stream of supply of these kinds of travellers' tales. In view of the implications of social media for the construction of knowledge in education (see Wolhuter 2020), the exploration of social media's implications and potential – as well as dangers – for comparative and international education is an assignment to be taken on by scholars in the field.

Phase 2: Comprehensive study of education systems abroad, with the aim of borrowing, since *c*. 1830

The formation of nation-states from the early nineteenth century (first in North America and Western Europe, and gradually after that in other regions of the world, too) and the creation of public primary school systems resulted in a new type of educational traveller. Mainly, government officials travelled to other countries regarded to have exemplary education systems and undertook systematic, exhaustive studies of those systems. The intention was to take over and borrow good ideas, policies and practices and to transplant them into their own education system at home in order to improve their own education systems.

This practice is still rife today (e.g. see Forestier & Crossley 2014; Steiner-Khamsi 2021). While thorough, these surveys of foreign systems of education do not satisfy the requirements of rigorous scientific research. Based on prior beliefs and thoughts, some education policies, practices and ideas are presented to be better than others. A good example is J Kozol's (1978) book on education in Cuba, based on his impressions of the Cuban education system, when he, as an American, spent a stint of time teaching in a school in Cuba. Furthermore, the biggest and fatal mistake of these studies was, and still often is, their failure to factor into their account contextual similarities and differences between exporting and importing nations when advocating borrowing. Comparison of education practices, ideas and policies over time and space should be careful of not succumbing too fast and too inconsiderately to the human fascination with coincidences and symmetry.

In recent times, Humboldt University of Berlin comparative education scholar Jürgen Schriewer (1990) has developed the concept of 'externalisation', describing the practice whereby governments win legitimacy for domestic education reforms by referring to (supposedly) foreign exemplary cases (see also Do Amaral & Erfurth 2021). Many scholars of comparative and international education have, in recent publications, pointed out instances where externalisation is rife in major education reforms in a variety of countries in the world (see Anderson-Levitt & Gardinier 2021). In Chapter 4 of this book, examples of recent publications in the field using this descriptor or heuristic device of 'externalisation' will be cited.

Phase 3: International co-operation since *c.* 1925

This phase in the historical evolution of comparative education was marked by the motivation and inspiration to improve the domestic education project (which was the driving force in the second phase), now being overshadowed by an ideal to improve the fate of humanity. This has also been described as the philanthropic ideal of comparative education (see Wolhuter 2017). The leading force 'of this [new] phase was the French scholar Marc-Antoine Jullien (1775–1848)' (Wolhuter & Jacobs 2022). Jullien coined the term 'comparative education' and is often called 'the father of comparative education' (Wolhuter & Jacobs 2022; also see Wolhuter 2019). In 1817, Jullien published his book, *Esquisse et vues préliminaires d'un ouvrage sur l'éducation comparée* [*Sketch and Preliminary Views for a Work on Comparative Education*]. This year, 1817, is then commonly taken as Year 1 of the science of comparative education (with the preceding two stages considered to be prescientific phases in the evolution of comparative education). Jullien saw education as a means to eradicate the political turmoil and wars in the world. Jullien had no demonstrable effect in his lifetime, but his proposed international co-operation was realised during the 20th century by means of global organisations, comparative education research centres (CERCs), studies global or international in scope, and comparative education societies and journals.

In 1925, UNESCO the International Bureau of Education, as a part of the League of Nations (UNESCO-IBE), was founded. This organisation had a brief to do the work as pleaded for by Jullien. That is why it has been customary to attach the year 1925 as the beginning of the activity of international co-operation in the field of comparative and international education. However, it should be noted that in a recently published contribution to the reconstruction of the historical evolution of the field, Bu (2020) argues that the International Institute at Teachers College, Columbia University, established in 1923, pursued this mission too. Formed in the aftermath of the First World War, during the peace talks in Paris (ending in the Treaty of Versailles) and President Woodrow Wilson's notion of self-determination of nations, the International Institute at Teachers College, Columbia University, was set up with comparativists such as James Russell and Paul Monroe playing leading roles. The institute sought to use education to pursue peaceful relations between nations and democratic world citizenship.

In any case, the International Bureau of Education was eventually superseded by the United Nations Educational, Scientific and Cultural Organization (UNESCO), set up in 1945 as an arm of the United Nations (UN) (UNESCO will be discussed in more detail in ch. 3, as one of the international organisations active in global education). By the 1980s, the World Bank, another international organisation that became involved in education, developed as the most prolific publisher of comparative education literature in the world (Altbach 1991, pp. 502–503) (as such, one of the international agencies active in shaping education around the world, the World Bank, will also be discussed in more detail in ch. 3).

A second kind of international co-operation in education by scholars of comparative and international education was taking place in research centres at universities. The most prominent of these include the Institute of Education, University of London (set up in the 1930s); the Ontario Institute for Studies in Education (OISE), established at the University of Toronto in 1964; the CERC set by Mark Bray at the University of Hong Kong in 1994; and the Centre for Comparative and International Research in Education (CIRE) at the University of Bristol in the United Kingdom (UK).

A third kind of international co-operation in education is studies of education that are international in scope. The oldest and probably the best known, as well as the most extensive, of these are the studies of the International Association for the Evaluation of Education Achievement (IEA), established in Stockholm in 1958. The IEA has been conducting a series of international tests on learners, including the Trends in International Mathematics and Science Study (TIMSS) tests, taking place triannually in a large selection of countries in the world, the Progress in Reading Literary Study (PIRLS, also done regularly, every few years, in a large number of countries) and similar test series done to test the learning of English and French as foreign languages, and test series measuring computer literacy and civic education in a large number of countries globally.

Another example of this kind of international or global study is the *Education around the World* book series of Bloomsbury Publishers, London, which was edited by the University of Oxford comparativist, the late Prof. Colin Brock (University of Oxford). This is a series of sixteen book volumes published between 2012 and 2016. Each volume covers a particular world region, with one or more chapters on the education systems covering education in all countries in the world.

A final form of international (as intra-national) co-operation is comparative and international education professional societies. The oldest and (measured by membership numbers) the largest is the Comparative and International Education Society (CIES), based in the United States of America (USA) but with a global membership. This society was founded in 1956 and has some 3,000 members. Then the Comparative Education Society in Europe (CESE) was formed in 1959. Since then, some 43 other professional comparative education societies have come into being. These societies have loosely confederated in the WCCES, which came into being in 1970. One of these 43 comparative education societies is 'the Southern African Comparative and History of Education Society (SACHES), which was [established] in 1991' (Wolhuter 2023, p. 2240).

Phase 4: A 'factors and forces' phase since *c*. 1930

The precursor to this phase was Sir Michael Sadler (1861–1943), a British historian, educationist, university administrator and education official in the British Government. In his 1900 Guilford Lecture at the University of Oxford, he severely criticised the activities of those who occupied themselves with the identification of best foreign education ideas, policies and practices, with the motivation to borrow these to improve the education system at home (i.e. what happened in the second phase of the history of the field, as explained earlier). Sadler's argument was that the education system of any country is the result of contextual factors. It was created by and is being shaped by societal forces uniquely textured in each national context. Each national education system was, therefore, uniquely crafted to serve the needs of a specific, unique societal context. Taking one element of the education system and trying to import it into another education system is therefore bound to end in failure as it will not be aligned to the new societal context. Therefore, the entire notion of education borrowing should be abandoned. The other implication of Sadler's ideas was that understanding any education system means its national context should first be studied. Leading comparativists of this phase all devised schemes to analyse (national) societal contexts (shaping national) and education systems.

As was stated at the outset of this survey of the historical trajectory of comparative and international education, the successive phases did not come to an end when the next phase entered the stage. So it is also true that this 'factors and forces' stage left a permanent mark on the field. 'Context', turning to societal context to understand education systems, has become a permanent, pivotal part of the work of scholars in the field (see Wolhuter 2008; see also Sobe & Kowalczyk 2012, 2014), while all major textbooks used to teach that comparative and international education courses take the pioneering protagonists of this 'factors and forces' mould (Isaac Kandel, Nicholas Hans, Friedrich Schneider and others) as the historical point in the development of comparative and international education (Takayama, Sriprakash & Connell 2017, p. 6). The 'factors and forces' mould also set in place the 'black box' feature of the field. This means scholars concentrate on context and neglect – even ignore – what is taking place in education systems and institutions. This created a lopsidedness or preposterous structure the field is suffering right up to this day (see Wolhuter & Jacobs 2022), a lacuna in the field which will be returned to later in this chapter and in this book, as it has implications for the shaping of a new era in the continual advancement of the field (the thesis argued in this book).

In the recent past, voices have also gone up that the 'factors and forces' protagonists have in their contribution to the crafting of the field contributed to the historic and current Northern hegemony in the field. The early protagonists of this phase, in particular, failed to take through their dictum of a context-determining education system to the extra-Western world. Takayama et al. (2017, pp. 10–11), for example, referred to the Eurocentric racial slant in the levels of development of civilisation construct wherein colonial subjects were categorised into the lower levels of an evolution ladder, which appear in the publications of Kandel, to instances where these early protagonists of this phase wrote off the colonies as places into which the education systems of the metropolitan powers could and should be imported (these colonies were deemed not worth developing their own education systems consonant with their own contextual ecologies) and to Kandel's idea that the colonies can be used as a testing laboratory for new education ideas and practices (regardless of the consequences these may have for the people of the colonies). The whole concept of 'context', which has become a key concept in the field, has come under scrutiny and criticism recently, not least because the way it is employed by scholars in the field makes it an agent of Northern hegemony. In the next section of this chapter, on the conceptual clarification of comparative and international education, context as a key concept in the field will be discussed, and later in the book, recent criticisms that the way 'context' has come to be defined and used as a concept in the field promotes Northern hegemony will be explained.

Phase 5: A social science phase from *c.* 1960

The history of the 25 years after the conclusion of the Second World War was characterised by, inter alia, the miraculous recovery of Western Europe, the Cold War and the decolonisation of large parts of – as it was termed at the time – the developing world or the third world. Analysts began to ascribe the economic miracle of Western Europe to investment in education. Thomas Schultz formulated his Theory of Human Capital, for which he was eventually bestowed the Nobel Prize in Economic Sciences in 1979. Historically, education was seen as a consumer item – having little or nothing to do with economic growth – or even an economic liability (see Wolhuter 2019). The Theory of Human Capital posits education or human capital as an element in the production process, next to and on equal footing with other production factors such as physical capital and infrastructure. The Theory of Human Capital resulted in a revolution in economic thought and contributed to a seismic shift in thinking about education as well (see Tonini 2021).

Turning to the developing world, Schultz contended that in the case of developing countries, the instrumental value of education in raising economic output is even more underappreciated than in the case of developed countries. To lend credibility to Schultz's argument, not long after he first proclaimed his Theory of Human Capital in his presidential address to the American Society of Economists in 1961, the book *Education, Manpower and Economic Growth: Strategies for Human Resource Development* by Frederick Harbison and Charles A Myers (1964) appeared, in which the authors showed by means of calculating a correlation coefficient between education effort or investment and economic output in 75 countries that there is a strong co-variation between the strength or development of a nation's education system and its economic output. This evidence gave impetus to the development of modernisation theory and to the growth of an unshakeable belief in the power of education in the development of nations (the theme of ch. 2).

But to return to the social science phase, it was not only with respect to economic development, development or modernisation that education came to be seen as pivotal. Education came to be seen as the solution to the entire round of challenges facing humanity, a 'panacea to all societal ills'. A limitless confidence in the power of education to bring about any wished-for societal change developed (see Lutz & Klingholz 2017). For example, education was seen as the key to stamping out drug abuse, reducing alcohol abuse, reinforcing a culture of democracy, moulding national unity, creating social cohesion or combatting AIDS (see Organization for Economic Co-operation and Development [OECD] 2018). These developments bode well for education and for the field of comparative and international education. As for education, a massive education expansion project took off in the 1960s. A detailed discussion of this feature of the world since the second half of the 20th century will be presented in Chapter 11.

As to comparative and international education, two developments induced by the context of the 1960s (as explained in the preceding paragraphs) should be noted. Firstly, the belief (among politicians, business leaders and scholars along the entire range of fields but especially in the social sciences and the humanities, the media and social commentators and the public at large) in the power of education promoted the expansion of comparative and international education at universities. In many countries, notably (but not limited to) the USA and Canada, new chairs for comparative education were created in universities, and research institutes were founded. On these institutional bases, professional societies were founded and flourished, conferences were organised and journals were created and prospered (see Halls 1990; Wolhuter et al. 2013).

The second development in the field was, as the name of the phase indicates, the emergence of the social science phase. Breaking radically with the humanities–history framework of the preceding 'factors and forces' phase, leading scholars in the field now wholesale appropriated the theoretical frameworks, paradigms, key concepts and epistemologies of the social sciences, such as sociology, economics, political science and anthropology. This included an embracement of quantitative (statistical) methods, which was in vogue in the social sciences at the time. Leading Columbia University comparativists Harold Noah and Max Eckstein (1969), in *Toward a Science of Comparative Education*, suggested that the task of comparative and international education should be to test hypotheses of the statistical effect of education on societal outcomes, for example, to investigate the correlation between the size of education effort and economic growth.

Phase 6: A phase of heterodoxy from *c.* 1970

The stellar global education expansion drive, which was launched in the 1960s, had not brought the expected societal returns. For example, instead of bringing accelerated economic growth, after the first oil crisis in 1973, the world entered an economic slump, the hitherto unprecedented phenomenon of stagflation appeared, playing havoc with Keynesian economics and with human capital theory (which, as was explained earlier, formed one of the bases of the rationale for the education expansion drive since the 1960s). Instead of decimating unemployment, education growth brought the spectres of schooled unemployment and graduate unemployment.

The result was that the 1970s was a time that, in contrast to the optimistic 1960s, a growing pessimism about the beneficial results of education (at least in its present form in the world) took hold. This pessimism took hold among the public and was evident in the public discourse on education, as well as among the scholarly community (as was evident in the scholarly discourse on education), including among the comparative and international education scholarly community.

An example of this pessimism, which beamed from comparative and international education literature appearing at the end of this decade of the 1970s (and a fitting illustration of the state that the field reached at the end of the 1970s), was the book by Swedish comparativist, Torsten Husén (1979), titled *The School in Question: A Comparative Study of the School and Its Future in Western Society*. As was mentioned earlier, one of the features of the 1960s was the belief that schools and education would promote social mobility – that is, create societies where descent had less effect on the life chances of people but would create meritocratic societies where education would determine or effect a person's life chances. At the end of his book, Husén (1979) comes to the sombre conclusion that the (view of the) school had changed from being 'the great equaliser in society' to 'the great sorting machine in society'.

The disillusionment with the positive outcomes of education gave rise to a series of paradigms in comparative and international education that opposed the dominant paradigms of the 1960s (such as modernisation theory and human capital theory, discussed earlier). It is the rise of these rival paradigms and their protagonists actively defending their stances and vehemently disputing with the proponents of the paradigms from the 1960s as key features of the 1970s that gave this phase the name of 'the phase of paradigm wars' or, as the University of Pittsburgh comparativist Rolland Paulston (1994) named it, 'the phase of heterodoxy'. A leading set of opposing paradigms (that is, opposing the 1960s paradigms) were the conflict paradigms, portraying society as consisting of an assortment of groupings of unequal power. In this situation, the powerful groups use education as an instrument and as a means to subdue and suppress the less powerful groups. Foremost among the conflict paradigms was the paradigm of socioeconomic reproduction (see Paulston 1977; Wolhuter 2007). While the trailblazer publication of this paradigm, Sam Bowles and Harry Gintis' (1976) *Schooling in Capitalist America: Educational Reform and the Contradictions of Economic Life*, is based on an analysis of schooling in the USA, this paradigm of socioeconomic reproduction has been applied (and claimed to hold) in a variety of contexts all over the world – these include the Global North, the Western bloc and the Union of Soviet Socialist Republics (USSR) of the time, as well as in the Global South, including socialist countries such as Nyerere's Tanzania (see Roberts 2017; Wolhuter 2007).

Besides the conglomerate of conflict paradigms, another front of opposition was micro-paradigms, the protagonists of which set themselves against both the 1960s paradigms and the conflict paradigms. The track layer of micro-paradigms in comparative education was an article by Stephen Heyneman (1979). Protagonists of micro-paradigms, such as ethnomethodology, ethnography and also phenomenology and phenomenography, took issue with macro-analyses of education and society and asked for a study of everyday practice, behaviour and interaction in classrooms and in schools instead of a study of macro structures far removed from everyday education practice.

A striking anomaly is that, in contrast to the rising pessimism around education and its private and societal dividends, the global education expansion, which kicked off in the 1960s, continued unabatedly; in fact, the expansion accelerated. Another feature of the global education expansion drive in its trajectory from the 1970s is that the centre of gravity of this global education expansion project slowly but undisputedly began to drift towards the Global South. This global education expansion project, and particularly the growing stature of the Global South therein, will be returned to in more detail in Chapter 11.

In contrast to the global education expansion project, the pessimism of the 1970s adversely affected the fortunes of comparative and international education. In the Global North (in particular the USA, Canada, UK and elsewhere in Western Europe), chairs of comparative and international education at universities were abolished, or incumbents were not replaced at retirement, and programmes of comparative and international education were scaled down or outright stopped (e.g. see Larsen, Majhanovich & Maseman 2007). Harvard University stopped teacher education in 1974, and the University of Chicago, once the home not only of John Dewey but also of the top research centre, the Comparative Education Center of C Arnold Anderson, in the 1970s first terminated its teacher education programme to focus only on research; this too dwindled as funds for education research began to dry up (see Bronner 1997). Writing about the situation of comparative and international education at Canadian universities, Larsen, Majhanovich and Masemann (2013, p. 173) called this phase the 'fragmentation of comparative education'. In contrast to the fading fortunes of comparative education at universities in the Global North, it stood strong and even expanded in parts of the Global South. This feature, together with the disproportional (to the Global North) growth of universities in the Global South, meant that the centre of gravity (at least in terms of student numbers and numbers of faculty) of the field of comparative and international education started to shift towards the Global South. That this shift has never been fully acknowledged or factored into contemplations on the historical evolution and current situation of the field was pointed out by Wolhuter (2001) for the first time two decades ago, and the purpose of this book is now to make an attempt to rectify this lopsided reconstruction of the field and its history.

Phase 7: A phase of heterogeneity since *c.* 1990

As the final decade of the 20th century commenced, advocates of various paradigms stopped to set their arms against each other, but rather, in keeping with the philosophy of postmodernism of the time, have begun to exuberate an acceptance, even a positive assessment, of different paradigms becoming evident in comparative education (Rust 1991, p. 32). Postmodernism denies the contention that one perspective or paradigm contains the whole truth; instead, it attempts to promote an awareness, acknowledgement and appreciation of the value of a diversity of knowledge perspectives.

The CIES presidential address (always held to be a weathervane of the field) kicked off in the 1990s with Vandra Masemann's 1990 presidential address, titled 'Ways of Knowing: Implications for Comparative Education', in which she urged scholars in the field to acknowledge and embrace alternative ways of knowing (Masemann 1990, p. 465). That was followed by Val Rust's 1991 presidential address, titled 'Postmodernism and Its Comparative Education Implications' (Rust 1991). The decade concluded with Ruth Hayhoe's 2000 presidential address when she clearly took up Vandra Masemann's invitation to challenge modernity by putting on the table the object lesson of two cultures and societies from antiquity, namely China and Japan (Hayhoe 2000) – this will be returned to in Chapter 2 on criticism against Modernism having the status of exclusive narrative in the field. The decade terminated with Ruth Hayhoe's (2000) address, referring back to Masemann's call that scholars in the field should:

> [*E*]xamine once again the metanarratives of our field and the moral and epistemological value they [*contain*] for our research. Hayhoe responded by discussing the challenge of modernity to two ancient cultures and societies, those of China and Japan [*in her presidential address entitled 'Redeeming Modernity', in 2000*]. (n.p.)

This was, therefore, a phase of the multiplication and variety of paradigms emerging in the field of comparative and international education and celebrated by many theoreticians of the field. These paradigms include – to mention but a few – semiotic theory, neocolonialism, systems theory, decolonialism, rational actor gaming, world systems analysis, critical anthropology, feminism, radical alterity, pragmatic interactionism, cultural revitalisation, phenomenology, phenomenography, liberation theory, critical modernisation and reflexive modernisation. This galaxy of paradigms illuminating the field of comparative education has been identified, described and mapped by an eminent comparativist at the University of Pittsburgh, Rolland Paulston (1930–2006), in a spate of publications right to the end of his life (Paulston 1977, 1994, 1999). It should be noted that for the proliferation of avant-garde paradigms, the traditional 'factors and forces' or humanistic-historical approach continued to have its protagonists, the most well-known being University of Wisconsin-Madison comparative education scholar Andreas Kazamias (e.g. see Kazamias 2018). In a recently published book by Tavis Jules, Susan Shields and Murray Thomas (eds. 2021), the following 27 major theoretical positions currently present in the field of comparative and international education are distinguished:

- structural-functionalism
- imperialism, colonialism and coloniality
- Marxism
- human capital theory
- dependency theory and world systems theory
- post-colonial theory
- postmodernism and poststructuralism
- post-foundationalism
- neoliberalism
- neo-institutional theory
- neo-realism
- neo-gramscian theory
- cultural political theory
- constructionism and learner-centredness
- differentiation and externalisation
- dependency theory and world systems analysis
- policy borrowing and lending
- peace education theories
- human rights education
- theories of race and racism
- queer theories
- transitologies
- actor network theory
- social network theory
- capabilities theory.

Amidst this ever-multiplication of theoretical and methodological orientations, the global education expansion project surged ahead, continuing the trend remarked upon earlier that was taking place in the 1970s, namely that the focal point of this global education expansion project has been migrating towards the Global South. This point will be returned to and elaborated on in Chapter 11.

Turning to the situation of comparative education at universities, whereas (to use the descriptive terms of Larsen et al. 2013) in the social science phase, comparative education at universities, in the Global North in particular, was in a phase of establishment and in the phase of heterogeneity, at universities in a phase of fragmentation (as was explained earlier), in this phase of heterogeneity, comparative education at universities (in the Global North in particular) was in a phase of broadening. That means comparative education returned, but not in the form of stand-alone courses under the name of comparative education or in the form of chairs of comparative education or comparative education research institutes. Comparative education was subsumed in courses such as ‘Education and the Ecological Crisis’, ‘Education and Postcoloniality’, ‘Colonial Education’ and ‘Decolonial Education’. Unmistakeably, the centre of gravity in terms of a number of universities with comparative and international education programmes and courses, too, has been moving to the Global South and continuing the pattern of the 1970s pointed out.

The panorama of the historical evolution of the field gives an idea as to what comparative and international education is all about. Therefore, it will now be possible to address the two questions of ‘What is comparative and international education?’ and ‘What purpose does comparative and international education serve, or what is the significance of this scholarly exercise?’. The next two sections will attempt to provide a clarification of these in turn.

Comparative and international education: Conceptual clarification

The name ‘comparative and international education’ as a scholarly field of enquiry has escaped the construction of an easy or widely accepted – let alone a universally accepted – definition. In her seminal publication constructing the field of comparative and international education, based on her doctoral thesis (done under the supervision of the University of Hong Kong comparativist and one-time president of the WCCES, Mark Bray), Maria Manzon (2011, pp. 199–205) tabled a wide assortment of definitions proclaimed by scholars in the field. She classified these definitions into three groups. The first group of definitions revolve around a proclaimed unique object of study. A second group of definitions are based on a (comparative) methodology. A third group of definitions are based on the purpose or use of the field. One reason for the lack of a uniform – or even a widely used – definition is that comparative and international education is a dynamic, expanding field, constantly exploring new territories and testing new frontiers, as was explained at the beginning of this chapter.

While there are many – divergent and even contentious – views among scholars in the field as to what comparative and international education is, Wolhuter (2023) has argued that comparative and international education is distinguished by its three-on-one take on education:

- **An education system perspective (see Bray & Jiang 2014):** The single case or instance of one educator educating one educand usually falls outside the interest of comparative and international education. Comparative education focuses on education systems, such as the Kenyan education system or the education system of China. If the individual educand–educator instance is studied, or the single classroom or single institution, it is studied as part of a larger education system.
- **A contextual perspective (see Sobe & Kowalczyk 2012, 2014):** Education systems have no haphazard structure and features but have been established by society in order to fulfil certain necessary functions. This means that any education system has been shaped by the society or by the societal context in which that education system is based and that the particular education system can be understood only by taking into account its societal context. The perspective of comparative education (which is most salient in phase four in the development of the field, explained earlier) on education is the contextual perspective. This perspective does not only mean the study of the societal context as a shaping force of education systems but also the study of the effect or societal outcomes of the education system on society, for example, the effect of education on entrenching a culture of democracy. It should be noted here that this conventional, historically evolved way of conceptualising 'context' in comparative and international education has recently come under severe criticism. This criticism links with the central thesis of this book and will be discussed in more detail later in this chapter and in Chapter 9.
- **The comparative perspective (see Cummings 1999):** Comparative education compares education systems and education-system–societal-context interrelationships in different nations or locations. In this way, more nuanced statements regarding education-system–societal-context interrelationships can be distilled.

Recently, there have been arguments that the name of the field, comparative education, should be superseded by comparative and international education (see Wolhuter 2016). The term international education is used here as used by David Phillips and Michelle Schweisfurth (2014, p. 60), as studying education from a global or an international scholarship.

Purpose, role and value of comparative and international education

The role, purpose, value and significance of the scholarly field of comparative and international education make up a demonstrably ever-accumulating list, with new purposes of the field constantly appearing on the horizon (see Wolhuter 2012).

However, the value or roles of comparative and international education are common in textbooks and scholarly books on the theoretical bases of the field, enumerated under the following captions:

- **Description, understanding, interpretation or explanation:** Assessment or application.
- **Education system planning:** Application.
- **Teaching practice:** Application.
- **Other fields of educational study:** Supplying the comparative method and serving the philanthropic ideal.

Description

At a most elementary level, comparative and international education describes education systems within their societal contexts, thus satisfying the search for knowledge, which is inherently part of human nature. However, no matter how much interesting and entertaining this exhibition of education systems is for observers to contemplate their wondrous variation, as one of the shaping figures of the field, as C Arnold Anderson (1961, p. 18), puts it, 'cannot be the be all and the end all of the comparative and international education exercise' (Anderson 1961, p. 18).

Understanding: Interpretation and explanation

> A consensus exists that comparative studies consist not of comparing but of understanding. (Przeworski 1987, p. 35)

At the next level, comparative education strives to comprehend – education systems are explained or understood from the contextual forces that have been shaping them (Barnard 1984, p. 264). The explanation of social and, in the case of comparative education, educational phenomena has become a motivation for comparative research and education (Schriewer 2021, p. 445).

The opposite also holds true – if education systems are shaped by the societal ecosystem in which they are embedded, comparative education also promotes an understanding of the societies in which they were called into existence. In a much-cited inaugural lecture titled 'The Use and Abuse of Comparative Education', University of Columbia's Harold Noah (1984) refers to education or comparative education as a stepping stone towards (the understanding of) cultures. In their standard textbook on the American education system for students of comparative education outside America, Wynn, Wynn and Young (1977, p. 386) began their description of the role of comparative education as follows: ‘comparative education deals with studying and comparing various educational theories and practices in different countries in order to deepen understanding of other nations and their problems’. Another form of expressing this value of the field is the belief held by two of the major comparativists and shapers of the field in the 20th century, GZF Bereday (1920–1983) and Paul Munroe (1869–1947), that comparative education can promote mutual understanding between nations (Bu 2020; Wojniak & Post 2020, p. 66) – a claim made in favour of comparative education, often repeated in the literature (e.g. see Barnard 1984, p. 266).

It is not only the comprehension of other or foreign education systems and nations that is brought about by the study of comparative and international education but also the understanding of the own education system and own society or culture, which is promoted by a study of societal–education-system interrelationships in various contexts. Bereday here used the metaphor of comparative and international education being a mirror of the own (see Wojniak & Post 2020, p. 66).

Evaluation

A third role of comparative education is to assess education systems. This means the assessment of a particular education system and also the universal assessment of education systems. Measuring the own national education system against that of other education systems in the world has assumed new prominence and value in a world of knowledge economies, that is, where the creation and trading of knowledge have become the base of national economies. In this dispensation, education has become an important part of the global race or competition between nations. The importance of education is evident in the rise of global testing regimes (such as the Programme for International Student Assessment [PISA] tests in particular, but also the tests of the International Association for the Evaluation of Education Achievement [IEA], such as the TIMSS) and the importance attached to these (see Carnoy 2019, pp. 197–217). Finland’s unexpected achievement of top place in the first round of PISA tests in 2001 instantaneously focused the attention worldwide on the education of Finland, as every nation immediately wanted to emulate the Finnish model, and Pasi Sahlberg’s (2010) book, *Finnish Lessons: What Can the World Learn from Educational Change in Finland?*, rose to become a best-selling and much-read book among the comparative education fraternity and among the wider public alike. In 2018, the OECD published the results of its PISA for Development (PISA-D) pilot project which was undertaken to fine-tune these tests to the contexts of low- and middle-income nations. This would encourage such nations to join PISA as part of the OECD’s Learning

Framework 2030 and to supply them with 'contextualised' policy recommendations (see Auld, Rappleye & Morris et al. 2019). So, it is reasonable to anticipate that in the near future, low- and middle-income countries (i.e. the nations of the Global South), which up to now have taken part only sparsely in the PISA test series, will be the more prominent participants. From the topic of this volume, the question is whether – or actually how – this represents an extension of Northern hegemony or an opportunity for Southern self-affirmation in the global arena?

The universal evaluation revolves around answering the question as to how well the education systems of the world have risen up to the exigencies of the 21st-century world, as well as a probing of the society-changing power of education and the extent to which education can be used to deliberately change society. Examples of the latter are as follows:

- Can education cultivate a society in which human rights are respected?
- Can education promote social mobility (that is, both individual mobility and group mobility) in society?

Application: Education system planning, reform and improvement

Comparative education expertise is also used in designing new education systems, planning education and reforming education systems (see Suter 2019, pp. 4–5). In reforming or improving education systems or in dealing with and addressing an educational issue, challenge or problem, one nation can learn from or benefit from the reform trajectory of other systems. Education system planning and using comparative education as a tool in education planning have been explained by University of Pittsburgh comparative education scholar, Donald K Adams (1925–2017) (also known above for his equally leading role in the establishment of development education as a field or sub-field of scholarship of comparative and international education, to be discussed in more detail in ch. 2), in a series of publications, including two *Comparative Education Review* articles (Adams 1977, 1988), a book chapter (Adams 1991) and a monograph on the topic (Adams 2002) (see also Weidman 2020).

The role of the field in identifying best foreign practices, ideas and policies to take over in order to improve the education system at home goes back to the phase of the systematic study of foreign education systems for borrowing (Phase 2, explained earlier). Graphically underscoring this purpose, the only two books from the scholarly field of comparative and international education that got on to the top-selling book lists amongst the wider reading public at large were written about foreign education systems as object lessons for the domestic education project. The first of these was Arthur Trace's (1961) *What Ivan Knows That Johny Doesn't*. This book was published in the wake of the *Sputnik* shock – when in the days of the space race, as part of the Cold War, the USSR beat the USA in launching the first orbital satellite. In the USA, this achievement was widely attributed to the proclaimed superiority of the education system of the USSR, something that contributed to the admiration of and a keen interest in Soviet education (see Noah 1986, p. 153). The book offered a comparison between the education systems of the USSR and the USA. The second comparative education book to become popular among the wider reading public was Pasi Sahlberg's (2010) *Finnish Lessons: What Can the World Learn from Educational Change in Finland?* In the case of this book, Finland's unexpected achievement of emerging as the top country in the first round of PISA tests in 2001 led to the Finnish education system quickly becoming the focus of attention for scholars and the public. In today's globalised world of cut-throat competition and neoliberal economics, with its principle of efficiency (to be discussed in more detail in ch. 5), enhanced emphasis is placed on evidence-based policy decisions, also in the realm of education (see Van de Vijver, Jude & Kuger 2019; Wiseman 2021), and this gives this role of comparative and international education a new significance.

Application: Improvement of teaching practice

It has been stated in this chapter that, as part of developments since the 1970s, in the heterodoxy stage of the development of the field, protagonists of micro-level studies asked for a movement away from the exclusive focus on the national to smaller units such as the institution or classroom, representing the scope for the future extension and unfolding of the field. While the prime focus of scholars in the field (as was explained earlier in this chapter when the concept of comparative and international education was elucidated) is the education system in its contextual interrelations, this does not preclude studies at the classroom level. Comparative and international education research at the classroom level will then entail studying education at the classroom level within the framework (or as part) of the (national) education system and societal context (see Denman 2019, p. 26).

However, the investigation of teaching and learning at the classroom level has long been neglected and even ignored by scholars in the field. In a pioneer publication, Cambridge comparativist, Robin Alexander (2001), in his book belaboured the potential significance of the field for teaching and learning at the classroom level (Alexander 2001). Regrettably, this theme has since then only sporadically been taken on by scholars. In a recent publication, Schweisfurth, Thomas and Smail (2020) surveyed 51 journal articles published on the topic since 2000. While publications on the value of the field for improving teaching and learning regularly pop up, as seen, for example, in Sarah Murray and Princess Allotey's (2021) chapter on the relevance of comparative education with respect to teaching primary school mathematics, clearly, this remains a topic underresearched and underappreciated by scholars in the field.

It is widely agreed (among scholars and in the public discourse of education) that there is a pressing need to move from teacher-centred to learner-centred teaching methods, and there is a clamouring for such methods in the public and scholarly discourse of education. In sub-Saharan Africa, there have been, since the 1990s, unprecedented attempts to introduce learner-centred pedagogies to counter the prevalence of teacher-dominated pedagogies that have been holding sway. University of Botswana comparative education scholar Richard Tabulwana (2013) has done an extensive study on these attempts and found that despite a substantial investment of energy and resources into such reforms, these reforms have largely failed because the societal and educational contexts in which these reforms had taken place were not taken into account. These contextual factors include a low level of technological development in schools and in society, widespread poverty and lack of teacher education in learner-centred pedagogies. On the basis of his findings, Tabulwana (2013) argues for the development of culturally responsive indigenous pedagogies, or a sociocultural approach. Indeed, there are reported cases of the successful introduction of learner-centred pedagogies in Africa. A UNESCO study published in 2011 (Vavrus, Thomas & Bartlett 2011) showcases a number of noteworthy initiatives or reform strategies in this regard in different parts of Africa, where various levels of success had been achieved (see Vavrus et al. 2011). The object lesson emanating from this survey is that the success or failure of such strategies in each case depends on the education system or societal context factors. What is clear from the studies of Tabulwana (2013) and Vavrus et al. (2011) is the value of the theoretical and epistemological apparatus of comparative and international education and of comparative and international education expertise in developing education (in this case, pedagogies) fine-tuned to contextual realities. This resonates with the theme of this book, namely, to bring the Global South into sharper focus and necessary correction in the field of comparative and international education.

On the need and potential of turning to the unexplored Global South in this regard, anthropologist and comparative education scholar Vandra Masemann (1990) stated, in her CIES presidential address mentioned earlier, that:

> Our conception of ways of knowing have limited and restricted the very definition of comparative education that we have taught students and used in our own research and, indeed, have promulgated to practitioners. This has led to wilful ignoring or bypassing of large areas of teaching and learning that are not considered in the domain of valid knowledge. (p. 465).

Application: Serving other fields of educational studies

Comparative and international education is also of value to other cognate fields of education scholarship (and, even further, to other fields of social sciences). As an example, the field of curriculum studies can be taken. Comparative education has on display the track record of different curricular models tried and tested at various locations and times in history. With regard to education policy studies, the University of London, Institute of Education comparativist Brian Holmes (1981) wrote that:

> [*C*]omparativists should be prepared [...] to help those responsible for policy, to implement adopted policies, and to help them to anticipate the outcomes and problems which are likely to arise when a policy has been implemented. (p. 54)

Denman (2019, p. 35) portrays comparative education, in this regard, as an 'applied study' that applies the comparative method (and theoretical toolkit) to assist other cognate fields of education scholarship.

Teaching students to do research

In these current times, when even in initial teacher education programmes students are expected to acquire research competence and when research methodology modules (even conducting a research project of limited scope) have become part of many teacher education programmes worldwide, the University of Bristol comparativist Michael Crossley (2016, p. 44), in the first published book on the teaching of comparative and international education, highlights schooling in the comparative method (which students can then use in carrying out a research project in any field of education) has given comparative and international education a new role in teacher education programmes.

Here, it is necessary to digress a trifle and to note that comparative and international education has a dual character. As is evident in the definition proffered, the field is characterised both by a distinct object of study and by a method (as is also clear from the discussion, some definitions focus exclusively on the method facet while others focus on the object of study). Here, it is also pertinent to bring in Robson's (2011) taxonomy of three levels of research methods, namely, methods of data collection, methods of data processing and methods of data interpretation. A research project can use methods at more than one or even all of these levels (and, in the belief of this author, should ideally use methods at all three levels). It is at the level of the interpretation of data where the comparative method is available, and schooling in comparative and international education assists in teaching research methodology.

The philanthropic ideal

The historical prime inspiration of the scholarly field of comparative and international education, the philanthropic ideal laid down two centuries ago by Jullien, remains the final goal of comparative and international education: making better the living conditions of humanity (see Wolhuter 2017). This ideal can be seen in the entire round of societal outcomes for which education was looked up to since the beginning of the social science phase of the field (as explained earlier) right up to the Incheon Declaration and the place accorded to education in the UN sustainable development goals (SDGs) (to be discussed in more details in subsequent chapters).

The present state of comparative and international education

Phase 8: Criticism against Northern hegemony[1]

Turning to the present state of comparative and international education, the field is beset by myriad theoretical frameworks. As was mentioned earlier, the latest conspectus of theoretical frameworks extant in the field, the edited volume of Jules et al. (eds. 2021), enumerates 27 theoretical frameworks rife in the field. The descriptor 'heterogeneity' clearly still holds true.

While the diversity of paradigms and theories can be taken to testify of a virile, dynamic field of scholarship, a case can be made for an integrative force or movement in the field, synthesising or bringing together everything (or at least as much as possible) in one schema. Donaldson (1995) argues that a diversity of paradigms can promote the disintegration of a field of scholarship. The existence of a plethora of paradigms ends in the absence of standard concepts as key currency among scholars in the field and in information overload for students of the field. The endless multiplication of paradigms also distracts attention from the real object of study.

1. The following section is based on two published materials: Wolhuter and Jacobs (2022, pp. 3–24) and Wolhuter (2023).

Other deficiencies in the past, but which hamper the field at present, were identified in the field, which include (Wolhuter & Jacobs 2022):

- the unresponsiveness or a lack of adequate response to the lure of new vistas
- the 'black box syndrome'
- the lack of an autochthonous theory
- an inadequate presence at universities
- an enduring Northern hegemony
- the lack of impact of comparative and international education research.

These deficiencies in the field will now be unpacked.

While both the new societal context and education practice are opening new and promising avenues for the scholars of the field of comparative and international education to explore, scholars remain in historically formative structures (see Wolhuter 2008; Wolhuter, Espinoza & McGinn 2023a, 2023b). For instance, the nation-state remains by far the dominant geographical level of analysis.[2] At the most extensive geographical level, that is, the global level (which is absent from the Bray and Thomas Cube but which is even higher or more extensive than Level 1 in this cube), societal trends are unfolding a massive global education project that is under construction (and this will be elaborated on in chs. 10 and 11, respectively). But, despite the landmark pioneer publications by Philip Coombs (1968, 1985) on the global education expansion project, as well as leading scholars in the field proclaiming the merits of the world cultural theory and neo-institutionalism (see Wiseman 2021) as promising theoretical frameworks, publications by leading comparativists showing global education policyscapes taking shape (e.g. Mundy et al. 2016) and a surge in interest in globalisation around the turn of the millennium (to be discussed in more detail in ch. 4), the study of education from a global lens hitherto failed to take centre stage or to move to the top slots of the research agenda in the field (see Wolhuter 2008; Wolhuter, Espinoza & McGinn 2023a). Moreover, the unbalanced (compared to other geographical levels of analysis) attention given to the nation-state has been defended by senior scholars in the field, such as Stanford comparativist Martin Carnoy (2019, p. 21). The outcome end (i.e. the societal effects) of the global education expansion project in shaping a new global culture has been underappreciated by scholars in the field, which has been highlighted by David P Baker in his 2013 presidential address to the CIES (Baker 2014).

2. See Wolhuter (2008), despite Bray and Thomas (1995), in a publication more than a quarter of a century ago, having delineated a hierarchy of seven geographic levels of analysis (Level 1: world regions or continents; Level 2: countries; Level 3: states or provinces; Level 4: districts; Level 5: schools; Level 6: classrooms; and Level 7: individuals).

This fixation on the nation-state at the expense of, among others, the global level, can be linked to the lamentable absence of scholars in the field, individually and as a collective, in major global education expansion drives such as Education for All, the millennium development goals (MDGs), SDG 4 and the Incheon Declaration (Wolhuter & Jacobs 2022).

One other way in which scholars in the field remain stuck in their historically beaten paths, and which is hampering the field, is with regard to the so-called black box character of the field (see Kelly, Altbach & Arnove 1982, pp. 518–519). A vestige of the formative influence of the 'factors and forces' phase in the historical evolution of the field (explained earlier in this chapter) refers to the feature whereby things outside the education system attract more attention by scholars in the field than that which takes place within the education system. These things outside the education system (or 'black box') are then, firstly, shaping forces of education systems and, secondly, the societal outcomes or effects of education systems.

Further to this, a second imbalance exists in the field in that the societal shaping forces of education receive much more attention than the societal outcomes of education (systems) (see Wolhuter 2008; Wolhuter et al. 2023a). This can probably be related to the enduring impact of scholars who laid the foundations of the 'factors and forces' stage in the evolution of the field (as explained earlier). This concentration of attention to matters outside education systems and institutions to the pushing aside of what is taking place inside education systems, institutions and classrooms is obviously one causal factor of the too little attention that what is taking place inside classrooms (such as pedagogies, ways of learning, student discipline and classroom management) has enjoyed among scholars in the field. Despite Stephen Heyneman's (1979) plea (explained earlier) over 40 years ago for comparativists to study the day-to-day activities and dynamics taking place within classrooms and education institutions, and notwithstanding Cambridge comparativist Robin Alexander (2001), in his pioneering publication and bulky 2001 book, explaining the potential value of studying pedagogy from a comparative education perspective, these themes have been largely avoided by researchers to this day. In a recently published survey, Schweisfurth et al. (2020) reported only 51 journal articles published on the topic since 2000 – clearly a topic underresearched by scholars in the field. The appeal for scholars to redirect their attention to intra-education system features and dynamics has also been the topic of two CIES presidential addresses, the passionateness of the plea being expressed in their titles, namely, William Cummings' 1999 presidential address, 'The Institutions of Education: Compare, compare, compare!' (Cummings 1999), and George Psacharopoulos' 1990 presidential address, 'Comparative Education: From Theory to Practice, or Are You A: \neo.* or B:*. ist?'. This presidential address leads to the next deficiency in comparative and international education.

Despite a fixation on theoretical frameworks or paradigms being (or at least being given as) the signature feature of the field since the 1970s (i.e. since the beginning of the phase of heterodoxy through to the present, as explained earlier), the field is still challenged by the lack of autochthonous theory in the field (Wolhuter 2015, pp. 30–31). Pondering how strong theories of other social sciences prevail as theoretical frameworks of comparative education research, comparative and international education scholar Irving Epstein (2022) recently correctly asked:

> Why [*is it*] a worthy pursuit to immerse oneself in knowledge domains that are conventionally construed as occupying independent spaces, whose positioning is separate and distant from the social practices to which they are then applied. (p. 760)

An indication of the severity of this feature of the field and of how little concern it is to many scholars in the field not only emanates from the CIES presidential address of Psacharopoulos but also is evident in the view of an eminent and respected scholar in the field, Erwin Epstein (2008, p. 373), who defines comparative education as being is nothing more than an applied study: the conceptual and methodological apparatus of the total gamut of social sciences, applied to address education problems or challenges. In line with the definition of comparative and international education proffered earlier in this chapter, a case can be made for the need for a theoretical edifice, centring education systems in their interrelationships with societal contexts and the comparison of these education systems within their societal contexts. As Marks (1997, p. 3) has suggested, ‘the goal of comparison is to find intelligible patterns of commonality beneath apparent diversity’. Thus, such an envisaged theoretical framework should yield a more complete comprehension of education and provide the scholar and practitioner with a wider reading base and a deeper understanding of education.

A fourth challenge facing the field is to stop and turn around the fading presence of the field at universities in many parts of the world. In large parts of the world, markedly parts of the Global North such as the USA and most of Western Europe, the historic nerve-centre of the field, the position of comparative and international education is undoubtedly a dwindling field, at least if measured by stand-alone programmes and courses and university chairs. In a small number of countries in these regions, such as Spain, Greece and then Eastern Europe as a whole, the field was on an upward trajectory during recent decades. On the contrary, in many parts of the Global South, the presence of the field at universities is strong and even growing. Lamentably, this does not apply to the entire Global South, but the stellar rise of the field at universities in China, both in terms of teaching and research, since the beginning of the 1980s as part of China’s ‘open door’ policy and the strong position of comparative and international education in initial teacher education programmes and in postgraduate education courses in post-1979 China (see Manzon 2013) is heartening. This differential fortune of the field – its dwindling in its historical heartland regions in the Global North versus its strong presence in parts of the Global South – ties in with the thesis of this book and will be returned to in Chapters 11 and 12. It should be mentioned that in the Global North, while it has a dwindling presence at universities in terms of stand-alone courses, comparative and international education is in many places present in the form of what Larsen et al. (2013, n.p.) calls in the Canadian context 'a phase of the broadening of comparative education'. That means comparative education is subsumed in courses such as 'Globalisation and Education', 'Human Rights and Education', 'Education and Development', 'Colonial Education' and 'Decolonial Education'. The problem is then that comparative education, as Vandra Masemann (pers. comm., 2008) put it, 'flows a mile wide but an inch deep'. Students never get acquainted with the theoretical and methodological bases of comparative education, nor with the rich scope and promise of the field.

The last deficiency identified in the field listed by Wolhuter and Jacobs (2022) is that of enduring Northern hegemony in the field and in education. The thesis of this book is that this criticism against Northern hegemony is such a pivotal feature in the field that it merits being elevated as a marker of a current, eighth phase in the historical development of the field. Furthermore, this criticism indicates the imperative for the beginning of a new phase in the evolution of the field, a phase characterised by the Global South coming into its own right.

Conclusion: Prospectus to this volume

The final deficiency or challenge identified by Wolhuter and Jacobs (2022), that of the persistent Northern hegemony in the field, will be explained in this book. The term hegemony means dominance by one group, having authority or influence over others. Northern hegemony is evident in the field (Wolhuter et al. 2023a, 2023b) and has identified the following related strands in the current discourse in the field:

- objections to foisting down one model of development
- objections against foreign aid and the activities of international agencies
- a vociferous anti-globalisation lobby
- objections against the impact of the neoliberal economic revolution on education
- objections against racism in education and in the field of comparative and international education
- a valuing of IKSs and a plea for its accommodation in the field
- accusations that scholars in the Global South are not operating on a level playing field.

The authors have suggested that these strands can be subsumed under the construct ‘criticism against Northern hegemony in the field’. The purpose of this book is to unpack and critically examine the strands of this construct. It is found that each of these strands and the construct as a whole have merit; at the same time, a number of caveats are identified, and it is spelled out that each of these constituent strands of the construct should take place within a delineated set of parameters. Therefore, Chapters 2–9 delve into each of these strands.

The current, customary periodisation of the timeline of comparative and international education is problematic (Wolhuter 2023; Wolhuter et al. 2022). It is especially so because the last phase (Phase 7) has now been running for over 30 years. While the multiplication of paradigms and theoretical frameworks cannot be denied, this is by no means the only feature of the field, nor can it be used as an umbrella term to capture everything that has been happening in the field during this time. In view of the thesis defended in this book, it is suggested that the name of the construct, ‘criticism against Northern hegemony in the field’, be used to denote the eighth phase in the historical development of the field, the current phase (Wolhuter 2023). The presentation of the most prominent strands in the field – unpacked in Chapters 2–9 – as a pivotal development currently unfolding in the field, meriting the title of a new phase, is buttressed by the rise of the Global South in both the global education expansion project and in terms of the societal context shaping education. These will then be the focus of Chapters 10 and 11.

From the depiction of the field in its historically developed way (outlined in chs. 2–9) and the portrayal of the rise of the Global South in global education and society (explained in chs. 10 and 11) emerge the yearning for a future ninth phase in the historical trajectory of the field, a phase characterised by the affirmation of the Global South both in the global education expansion project and in the societal context shaping education. In the subsequent chapters, the parameters of such a phase will be identified. In the final chapter, all these parameters will be synthesised and the outlines of a desired future ninth phase in the development of comparative and international education will transpire.

In this way, this book connects to the call made by Karen Monkman (2022) in the most recent CIES presidential address. When reflecting on the increasingly rich, diverse contextual tapestry in the world that scholars of comparative and international education face, she asks (Monkman 2022):

> Discursive framings of CIE embed particular agendas and ways of seeing the world, and they in turn shape how we think, understand, and act. More concretely, our field has seen an increase in the types and numbers of actors involved, including nonstate actors such as celebrities, billionaires, corporations,

> and others, each of whom has their own priorities and ways of engaging in education globally.
>
> Now more than ever, we need to understand with much more nuance these realities across diverse communities and within our changing field. We need to act in ways that are informed by a profound responsibility for the consequences, with, as I will suggest, a renewed focus on considering what really matters in and for the field. (n.p.)

In view of the recent mapping (or conspectus) of the field in terms of four narratives (mentioned earlier), the connection between these narratives and the imperative for the rise of the Global South will also be explicated in this book. In Chapter 5, the neoliberal economics narrative will be discussed. In view of the pivotal role that UNESCO has played in taking the initiative with regard to human rights education in the world, the human rights narrative will be discussed in Chapter 3 as part of the discussion of UNESCO as an international organisation active in education. The turn of the social justice narrative will come in Chapter 6 as part of the discussion regarding the call for decolonial education, while in the final chapter, where a vision for the future trajectory of comparative and international education and for education and the world is spelled out, the human capabilities narrative will be introduced.

This book, firstly, presents the take of the author on the field, having lectured comparative and international education for 40 years at three South African universities, as well as serving as a visiting professor of comparative and international education at universities on all six continents and having read consistently and widely in the field, and having discussions on this topic with leading scholars in the field in all parts of the world. Secondly, this book is written from the Education and Human Rights in Diversity Research Unit (Edu-HRight) at North-West University, South Africa, with which the author is affiliated. From that vantage point, the Creed for Human Rights is held out as the moral base for what is pleaded for in this book. That is, this book aims to attempt to set in motion the movement towards a new phase in the historical development of the field, in which the élan for the affirmation of the Global South will stand central. It is the belief of the author that such a phase will constitute a quantum leap for the field, setting it on a stage where it will be of unprecedented value.

■ A note on research methodology

Mention has been made earlier of Robson's (2011) taxonomy of research methods at three levels. These are the levels of data collection, data processing and data interpretation. The data source was a literature survey, buttressed by this book's author's teaching and research in the field of comparative education for over 40 years at many universities. This literature survey then includes the major books published in the field since its inception, as well as articles published in leading journals in the field, such as the *Comparative Education Review*, *Comparative Education* and *Compare: A Journal of Comparative and International Education.* The four most commonly used comparative education textbooks at universities were all read. These are Bob Arnove, Carlos Torres and S Franz' (eds. 2012) *Comparative Education: The Dialectic of the Global and the Local* (2012); Patricia Kubow and Paul Fossum's (2007) *Comparative Education: Exploring Issues in International Context*; Karen Mundy, Katherine Bickmore, Ruth Hayhoe, M Madden and M Madjidi's (2008) *Comparative Education: Issues for Teachers*; and David Phillips and Michele Schweisfurth's (2014) *Comparative and International Education: An Introduction to Theory, Method and Practice* (second edition). All of what Cook, Hite and Epstein (2004, p. 138) identified as the 25 most influential publications in the field of comparative education were read.

At the level of data processing, this literature was only synthesised, and holistic, general patterns were sought in this overview of the corpus of comparative and international education literature. From this exercise arose an intertwined cluster of strands, making up a very salient pattern. This cluster can be termed 'criticism against Northern hegemony' (in the field and in education). This processed data was then, at the level of data interpretation, subjected to critical interrogation and critical assessment. The outcome thereof was the conclusion that the field is in need of a next (ninth) phase in its historical evolution, where the affirmation of the Global South will be the signature feature.

Conclusion

The ultimate thesis of this book is to lay the basis for a new, ninth phase in the evolution of the field of comparative and international education, namely, a phase of the affirmation of the Global South. It is argued that this affirmation of the Global South should be predicated on the Creed of Human Rights as a moral framework for a globalised world. In the next chapters, each of the strands in the current discourse in comparative and international education, which adds up to criticism of the current Northern hegemony and from which the vision of a ninth phase emanates, will be teased out and critically examined.

Chapter 2

The discreditation of the notion of development and of modernisation theory

Abstract

In the decades after the Second World War, development and modernisation had been held forth as the big need for nations of the Global South. In this exercise of development and modernisation, education was given a pivotal role. However, it was not long before both development and modernisation became widely discredited in the comparative and international education scholarly community. The relation between education and development or modernisation has also come to be understood as being much more complicated than originally proclaimed by development or modernisation theorists. A central part of the criticism against both the notion of development and modernisation theory is that these are based on the Western experience and, therefore, biased. From the basic theoretical foundations of comparative and international education, it can be accepted – indeed, it sounds logical – that the Western experience of development and modernisation cannot summarily be transplanted to the extra-Western world; that is, the Global South. On the other hand, unconsidered experimentation with alternatives has no proud record to boast. The assignment of comparative and international education scholars in the coming decades is to assist and

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guide the crafting of Global South context-fitting alternatives to development and modernisation. The Creed of Human Rights and Carlos Torres' Global Commons are laid down as parameters for the development of such alternatives.

Introduction

After the Second World War, a new geopolitical order emerged. There were two superpowers, namely, the USA and the USSR. These two superpowers were the leaders of two emerging blocs in the North, namely, the Western bloc and the Eastern bloc. The European colonial countries came out of the Second World War much weakened (from what they were before the war), no longer capable of holding onto their colonies in the South. One after the other, they had to grant the colonies in the South independence. In this regard, a major event was the independence of India on 15 August 1947 in Asia, while in sub-Saharan Africa, the tone setter was the independence of Ghana on 06 March 1957. However, in a world where the UN was set up in 1945 to secure everlasting peace in the world (the UN General Assembly, of which each member state has one equal vote) and where the Cold War pitted the Eastern and Western blocs against one another, the nations of the South and their well-being were of interest to the North. The contention took hold that these countries outside of Europe and North America were undeveloped (later, the term 'undeveloped nations' was replaced by the more euphemistic underdeveloped or developing countries, to contrast them with the developed countries) and that all these countries or nations needed was development. A whole new scholarly field of development economics or development studies came into existence. However, the model of development put up as what the developing world should aspire to was based entirely on the Western experience of development (Kothari 2006; Macintyre, Tubino de Souza & Wals 2023).

In this context, modernisation theory came to the fore, which, as was explained in Chapter 1, was preached as a central article of faith by scholars in the field during the social science phase of comparative education since the 1960s. Modernisation theory contends that the developing world is in need of economic, social and political development and that the cheapest, quickest and most efficient way to bring about such modernisation or development is education (Fägerlind & Saha 1984, p. 49). In the 1960s and the 1970s, modernisation theory became the most salient theoretical position in comparative education (Kelly, Altbach & Arnove 1982, p. 506).

In the course of time, voices of criticism (within the field of comparative and international education and beyond, in the public and also scholarly discussion on education and on economics and social and political affairs) were voiced against modernisation theory and against the existing, proclaimed (Western-based) model of development. In this chapter, the evolved model of development and modernisation theory, the critique thereof and the alternatives proffered will be explored, with the final aim of constructing a better comparative and international education.

The clarion call for 'development'

Todaro and Smith (2011, p. 5) defined 'development' as 'the process of improving the quality of all human lives and capabilities by raising people's levels of living, self-esteem and freedom'. 'Self-esteem' here refers to a 'feeling of worthiness that a society enjoys when its social, political and economic systems and institutions promote human values such as respect, dignity, integrity and self-determination' (Todaro & Smith 2011, p. 21).

As was explained, in the second half of the 20th century, the call for the development of nations collectively called developing, underdeveloped or less developed nations was proclaimed from the commanding heights of the nations known as the developed world. It was taken that the only template for development was that of the developed world and that the model should be emulated by the developing world.

In this view, which held sway in Western scholarly circles, Western history was viewed as a change from a medieval theocentric life and worldview. This view, centring God as the beginning and end of everything, was replaced in the post-medieval era with humanism, that is, a life and world philosophy placing humans as central (see Shipton, Guirguis & Tudu 2020). This change in life and world philosophy was induced by scientific-technological development, which Western societies underwent during the centuries after the Middle Ages and which radically affected the lives, beliefs and philosophies of Westerners. Traditional structures of authority were eroded. Hierarchical structures, whereby some people (along with their beliefs and views) were placed higher than others, were no longer uncritically accepted. Furthermore, human beings increasingly lived in a world brought about by themselves, with fewer and fewer things hidden and beyond rational explanation. These developments promoted the transformation of a re-orientation of life and world philosophy whereby the emphasis was displaced from supernatural to rational causality (Idenburg 1975, p. 40). In the case of the former, empirical phenomena were explained by reference to God, gods, well-meaning and evil-meaning spirits and supernatural creatures or forces, whereas in the latter, phenomena are explained by empirical causes.

The minds and outlook of modern Westerners were also shaped by religious, philosophical and economic philosophies. On 04 July 1776, on exactly the same day when the USA declared independence, Adam Smith's (Edinburgh University) book *An Enquiry into the Causes and the Nature of the Wealth of Nations*, praising free market policies, was launched. This book became the basic text for a free market economy. Sociologist Max Weber, in his book *The Protestant Ethic and the Nature of Capitalism*, showed how Puritanism or Calvinism and the attendant philosophy of capitalism or free market have shaped the nature of Anglo-Saxon societies. In the mid-19th century, Charles Darwin's *On the Origin of Species* (1859) and John Stuart Mill's *On Liberty* entered the scene; these publications and the schemes of thought promoted a shift to secularism and individual responsibility. A final publication of the mid-19th century is worth mentioning. In 1859, the same year as the publication of Darwin's *On the Origin of Species*, Samuel Smiles, a Scottish journalist, biographer, social reformer and physician published an authoritative book on the 19th century 'character, conduct and perseverance' (in Victorian UK) (Dufoe 2023). His book was aptly entitled *Self Help* and dealt with self-help and its role in character development. Smile's thesis, formed from a number of bootstrap narratives or biographies of successful people in history (such as Napoleon, Newton and Mills), was that national progress is the combined total of individual initiative, thrust and moral rectitude and that national deterioration is the outcome of individual laziness, aimlessness, selfishness and lack of moral rectitude. Historian Asa Briggs claims that self-help was one of the defining virtues of this era, something that helped to shape the stalwart Victorian work ethic. By the time of his death in 1904, Smile's book had already sold more than a quarter of a million copies and was an international top seller.

The features of a person pertaining to the developed or the modern world are perhaps best articulated or enumerated by Alex Inkeles and David Smith (1974). According to the concept of development that gained traction, a modern human being displays the following features (Fägerlind & Saha 1984, p. 95, cited in Wolhuter 2020, p. 105):

- being open to new experience, ready for social change
- being conscious of diversity in attitudes, beliefs and views
- being energetic in the acquisition of facts and information to base views on
- having a time orientation towards the present and the future rather than towards the past
- having a philosophy that humans can control, influence and manage their environment
- attaching high value to formal education
- respecting the dignity and rights of others
- having an understanding of the logic underlying industry and production

- believing in the equality of people regardless of gender, age, etc. (universalism)
- not being dominated by feelings of fatalism (optimism).

Within the scholarly field of comparative and international education, an entire sub-field of studies called development education came into being, focusing on developing countries and education in the development of such countries (at a time before the terms 'development' and 'developing countries' became controversial or even discredited), a sub-field in which the name of Donald K Adams (1925–2015) of the University of Pittsburgh stands central. Key publications include his 1977 article published in the *Comparative Education Review* (Adams 1977) and his 2002 book (Adams 2002) (see also Adams 1988, 1991). The other classic book in this area of comparative and international education is *Education and National Development: A Comparative Perspective* by Ingemar Fägerlind and Lawrence Saha ([1984] 1989).

Within this sub-field, a journal entitled *International Journal of Educational Development* was first established in 1981. Although the stated purpose of the journal is to report on new insights and to foster critical debate about the value of education as an instrument effecting development, it somewhat conflates education as a contributory factor in development and the development of education *per se* (see McGrath 2010). Nonetheless, this journal has been in circulation for more than 40 years and publishes eight volumes annually. As of October 2022, 95 volumes have already been published.

However, the notion of 'development', in particular the way this concept has evolved and the specific meaning attached to it, has attracted criticism over the course of time. A major point of contention revolves around the 'deficit' approach, namely that development is conceived as something that the developing countries lack, and their only trajectory for evolving or progressing is to move closer to the Western model (see Johansson-Fua 2016, p. 34).

Modernisation theory and the role accorded to education

It was during the decades of the 1950s and especially the 1960s that modernisation theory came to the fore, offering a blueprint as to how developing countries should develop.

Advocates of modernisation theory portrayed the world as consisting of two sets of countries (Marques 2021, p. 30). The first set consisted of the USA, Canada, Western Europe, Australia, New Zealand and Israel.

These countries were known as developed, advanced or modern countries. Then, the second set was made up of Africa, the Middle East, Asia and Latin America. These were called the developing countries. Sometimes, a threefold classification of the countries of the world was presented, with the Western bloc (USA, Canada, Western Europe, Australia, New Zealand and Israel) being the First World, the Eastern bloc of the time (USSR and its satellite states in Eastern Europe) as the Second World, and finally the Third World, that is, the developing countries. In each case, the advocates of modernisation theory claimed that the developing countries, having recently emerged from a long history of colonisation, now stand before the task to develop or modernise, and on a trajectory, pattern or template that the Western or First World countries developed during and after the Fourth Industrial Revolution (4IR). That process (or the Western model) has a universal, inescapable pattern (Bernstein 1971). Notable proponents of modernisation theory include Alex Inkeles (1920–2010), whose ideas were discussed earlier, Neil J Smelser (1930–2017), James S Coleman (1926–1995) and Walt Rostow (1916–2003). Influential publications or ideas included the publication of Alex Inkeles and David Smith (1974), referred to earlier, and Walt Rostow's (1959) model of five phases of economic growth, namely, traditional, preconditions for take-off, take-off, maturity and, finally, high mass consumption.

As was explained earlier, modernisation theory contended that the cheapest, fastest and most efficient way to bring about the desired modernisation or development in developing countries was education (see Fägerlind & Saha 1984), and as a result, in the 1960s and the 1970s, modernisation theory became the dominant theoretical framework in comparative education (Kelly et al. 1982, p. 516). Altbach (1991, pp. 502–503) writes that by the early 1990s, the World Bank had become the most prolific producer of literature on comparative education in the world. The World Bank papers on education development in developing countries are based on modernisation theory.

A voluminous amount of literature within the field of comparative and international education did appear in support of modernisation theory, that is, lending weight to the thesis of education being an effective agent of bringing about modernisation. In one of the earliest extensive case studies, University of Wisconsin-Madison comparativist Andreas Kazamias (Cypriot born, speaking Turkish fluently) outlined in his book, *Education and the Quest for the Modernisation of Turkey* (Kazamias 1966), the modernisation by ruler Kamal Ataturk as from 1923, when he, in a series of forceful reforms, modernised or Westernised Turkey from the remnants of the Post-First World War Ottoman Empire (Kazamias 1966). Kazamias used the techniques of a historian and social scientist, and his book revolved strongly around the introduction of the *lycée*, a selective secondary school type found in France. Kazamias actually criticises the limited introduction of this school type into Turkey as a factor that did not enable this school type and education to give the modernisation process in Turkey an even stronger boost.

In a more recent publication, Lutz and Klingholz (2017) detail the positive role of education in the modernisation of a number of nations, citing a diverse array of empirical studies and presenting a number of case studies to corroborate this belief in the societal, beneficial effect of education. For example, they argued that education was an important ingredient in the impressive record of Mauritius in modernisation in a short span of time during the 1960s and 1970s (Lutz & Klingholz 2017, pp. 70–76). In the early 1960s, at the time of independence, the economic and social conditions were in such dire straits that a renowned development planner, on a mission to Mauritius, described the country as ‘hell on Earth’ (Lutz & Klingholz 2017). Lutz and Klingholz (2017, pp. 70–76) described the trajectory of the country over the next two decades as ‘From hell on Earth to paradise in the Indian Ocean’. In the early 1960s, the country was undeveloped and plagued by rampant population growth (at that stage 3% per year); the government thought along the lines of encouraging emigration and increasing the agricultural sector of the economy (though this sector, given the very small area of the country at 2040 square kilometres, had very little potential for expansion) in order to address the economic woes. On the counsel of development advisors, the country embarked on a road of impressive modernisation. While in the 1960s, the country was, in terms of World Bank Classification, a low-income country, it has become a high-income country (i.e. on par with the nations of Western Europe and North America) in 2019, with its current per capita annual gross national income (GNI) of US$25,043 (World Bank 2022). A whole range of policies and practices lie behind this achievement, and Lutz and Klingholz outlined some of these, including policies encouraging birth control and policies to diversify and open the economy. At present, Mauritius is, for example, 13th out of 190 countries in terms of ease of doing business (World Bank 2022). However, Lutz and Klingholz (2017, p. 170) contend that education was an important factor in the equation, not only in terms of raising human capital but also indirectly in reducing fertility. In 1962, 80% of 15–24-year-old women in Mauritius had undergone at least some schooling, whereas the preceding generation, those then aged 35–44-years-old, were only half as likely to have had any schooling. This means the percentage of women with a basic education had doubled within the space of 20 years. This achievement was not limited to basic education. While in 1970, only 24% of girls attended secondary school, by 1980, only a decade later, that figure jumped to 52%. By the 1980s, Mauritius had already become the second-highest educated African nation after South Africa.

Criticism against conceptualisations of development and against modernisation theory

In recent times, much criticism has been expressed against modernisation theory and the related concepts of 'modern' and 'modernity'. This includes criticism from scholars writing from the perspective of comparative and international education (see Wolhuter 2018). These pertain to criticism against Western bias. A somewhat milder form of criticism is the request that Western experience should not be the one considered in the field. Ruth Hayhoe's (University of Toronto) 1999 CIES presidential address, titled 'Redeeming Modernity', is exactly that. Taking a cue from Vandra Masemann's previous presidential address (discussed in ch. 1), Hayhoe, drawing on many years' extensive work in the field in China, pleads for comparativists to embrace the experience of other cultural realms in developing a notion of development (see Hayhoe 2000). Then, there has also been criticism against the place accorded to education in the modernisation process. This criticism is related to the assumption of there being a deterministic relationship between education and modernisation (or then at least the kind of modernisation foregrounded by modernisation theory).

Criticism against the conceptualisation of development and against modernisation theory entails, firstly, criticism against the so-called deficit model posited by modernisation theory and by the dominant conceptualisation of development, namely that the kind of modernisation dictated by modernisation theory (e.g. as spelled out by Inkeles & Smith 1974) is based on the Western experience and is the only kind suited for extra-Western societies as well (e.g. see Blaut 1993; Suter, Smith & Denman 2019, p. xxxv; Yang 2019, pp. 65–66; Wallerstein 1997). This makes it part of the construct of criticism against Northern hegemony as a key feature of contemporary comparative and international education, as argued in this book. Comparativists such as Iveta Silova (2019) have criticised this parochial view and have contended that this model is not necessarily appropriate for or relevant to extra-Western contexts. Takayama (2018, p. 467) points out that the pioneer of comparative education at Columbia University, Paul Monroe, used Western criteria as the index of the point of development of other societies. A more extreme version discredited modernisation theory even more strongly, criticising it on its ideological premises, portraying it as a weapon of the West in the 'intellectual Cold War' (e.g. McCleod 2016) and alleging that the rationale of modernisation theory is actually to serve the interests of the Western superpowers in their quest to maintain the present world order (e.g. Freire & Da Costa Britto Pereira Lima 2018).

Dependency theory and world system analysis project the tenets of reproduction theory on a world-scale canvas. Following the ideas of

Immanuel Wallerstein, proponents of dependency theory contend that the way education functions in the world today, economic and political masters in the Global North, by accident or design and as a relic of colonial dispensations, keep societies of the Global South in a relationship of dependence to the Global North (e.g. Altbach 1982). The world systems theory of economist André Gunder Frank and others takes it further and holds the view that the economic subservience of the nations of the Global South cannot be seen without the context of an entire global economic and political system or dispensation (i.e. also the gamut of international agencies, to be discussed in ch. 3) set up against them. This thesis is graphically depicted in the André Gunder Frank's (1966) publication titled *The Development of Underdevelopment*.

World systems analysis also has its proponents in comparative and international education, for example, University of Indiana comparativist Bob Arnove (2009). These paradigms represent a striking blow against modernisation theory. Within this criticism of Northern hegemony regarding the conceptualisation of modernisation and development, there have been criticisms as to how the dominant conceptualisation of modernisation and development plays into the hands of global capitalism or the neoliberal economic revolution (Rust 1991, p. 622).

One of the features of modern societies is diversity and hyperdiversity, and not only the acceptance and tolerance but also the valuing thereof (see Rust 2022). This forceful trend has also been epoch-makingly strong in comparative and international education. As was explained in Chapter 1, it heralded the seventh stage in the historical evolution of the field (phase of heterogeneity, since *c*. 1990), as is also the key marker of this phase. To set up one rigid model as the only model of modernisation and development stands in vivid contrast to this contemporary feature of society.

There has also been criticism expressed against the role accorded to education in effecting modernisation. Education is not a deterministic, manipulable process with guaranteed outcomes. This has been explained by philosopher of education Gerd Biesta (2013) in his book with a striking, summative title: *The Beautiful Risk of Education*. The very nature of the education process and of the actors involved rules out the possibility that the school can deliberately be used to steer society in a particular direction. Biesta (2013) contends that as the educand has freedom of choice (as has the educator), the outcome of education can never be predicted – a feature he appreciates from an existential point of view and which he calls 'the beautiful risk of education'. Then, there are scholars who have drawn attention to credentialism, such as Ronald Dore (1976), who coined the term 'the diploma disease' and who alleges that students attend education institutions to attain qualifications to improve their own chances in life and not to pursue some lofty social goal. Likewise, Pierre Bourdieu's concepts of navigation and habitus. Also, education scholars such as Joorst (2013) have shown how students, in pursuing their own agenda, steer their way around the agenda set by education managers and policymakers.

But, it is not only at the (individual) level of the educand that the theory of modernisation and its belief in the power of education runs into difficulties. At the societal level, these premises are problematic, too. As was explained in Chapter 1, comparative and international education is based on the premise (and this underlying assumption is shared among most, even divergent, paradigmatic orientations making up the field) of an interrelationship between the education sphere and other societal spheres (such as the economy, politics and sociocultural situation in all its facets). Now, not only is the education sector interrelated with every other sector, but also these sectors themselves are interrelated; they affect and shape each other. Moreover, each sector has its own agency, however circumscribed that agency is in the sector's interrelationships with other sectors. The state of every other sector limits whatever leveraging power education may have on any other sector. For example, the impact of education on economic growth in a society will depend on what is going on in the economic sector itself (e.g. whether economic fundamentals are in place; is there a stable currency and a stable, trustworthy banking system; etc.). The effect of education on economic growth will also depend on every other sector. For example, it will depend on the political sector (whether there is political stability, policy certainty, rule of law, pro-economic growth policies, etc.). These complicating factors and preconditions to the leveraging power of education will be returned to later in this chapter, as well as in Chapters 10 and 12, where the parameters and preconditions for the affirmation of comparative and international education in the Global South will be laid out.

The point on the complexity regarding the societal outcomes of education will be somewhat belaboured here before moving onto the questions regarding alternatives to modernisation. Take the example of the role of education in curbing the population explosion. Concern about the effect of rampant population growth dates at least from the essay of Thomas Malthus (1826) two centuries ago, in which he predicted the future course of history of humanity as a race between population growth and food production, the former likely to win, but resulting in mass starvation. With the global population explosion really taking off during the decades after the Second World War, Stanford Professor Paul Ehrlich's (1968) alarmist book, *The Population Bomb*, secured the population explosion a place in the public discourse.

In a very dispiriting and distasteful part of the history of India, rule under the State of Emergency during the mid-1970s, the government was eager to fend off population growth amidst predictions that India's population would reach the 1.5 billion mark in 2050 (grossly overtaxing the natural and economic resource base of the country). The Indian government's policies of encouraged (if not forced) sterilisation of roughly 8 million citizens, whereby nearly 2,000 died because of botched operations in unsafe, ill-equipped settings (see Ferguson 2021, p. 32). These are relevant here as this book is published as part of the activities of a research unit on human rights and education. While most extreme in India, these kinds of responses to the envisioned problem of overpopulation were not limited to the Indian government in the decades of 1960–1980. Robert MacNamara, in his capacity as president of the World Bank, declared in 1969 that the World Bank would not finance health care projects 'unless it was strictly related to population control, because usually health facilities contributed to the decline of the death rate, and thereby to the population explosion' (Ferguson 2021, p. 32). Some institutions, such as the Ford Foundation and the Population Council, also mooted the idea of mass involuntary sterilisation of entire populations (Ferguson 2021).

More often – commendably and hearteningly, but also with its own host of challenges – education is hopefully looked to as an answer to the unchecked population growth that is still present in large parts of the world (Colclough 1996; Idenburg 1975, p. 89; Rose 2003, p. 71). In a recent publication, scholar of development studies Greg Mills (2021, p. 90) expresses this belief as follows: 'The only conceivable and sustainable way to bring down these rates of population growth is [...] education'.

To first give the context of the population explosion: The annual population global aggregate population growth rate reached a maximum of 2.1% per year in 1968 and currently stands at 1.0% per year. Every year, the global population grows by 81 million people. This figure is declining every year, after having reached a peak of 93 million in 1988. On 01 November 2022, the global population stood at 7,997,401,000 and was set to reach the 8 billion mark on 15 November 2022 (Population Matters 2022). Another way to appreciate the extent of population increase in recent times is to look at the times when the milestones of a total global population of 1 billion, 2 billion, 3 billion, 4 billion, etc. were reached. In 1803, the global population reached the 1 billion mark; in 1930, the 2 billion mark; in 1960, the 3 billion mark; in 1974, the 4 billion mark; in 1987, the 5 billion mark; in 1998, the 6 billion mark; and in 2012, the 7 billion mark (Population Connection 2022). That means it took roughly 200,000 years to reach 1 million, 123 years to reach 2 billion, and only 33 years to reach 3 billion. The last several billion milestones (4, 5, 6, 7 and 8 billion) were reached in 14, 13, 11, 12 and 12 years, respectively (Population Connection 2022). The UN predicts that it will take fifteen years to get to the point of 9 billion (2037), and after that another 21 years (2058) to get to 10 billion. According to the predictions of the UN Population Division (2020), the global population will stabilise at 11 billion by the year 2100.[3]

As was stated, education is widely looked to as a means to curb this problem of unchecked population growth. However, the evidence is less convincing. Coetzee (1988) surveyed some 30 studies that investigated the co-variation between education levels and levels of fertility in various parts of the world and came to the conclusion that the findings vary between positive correlations, negative correlations, curvilinear relations, bimodal relations and no relations. Although a large number of studies did find negative correlations, there are so many exceptions that these cannot be ignored (Coetzee 1988). In an extensive study on this topic, done by the United Nations during the period 1980 through 1985, it was found that in eleven of the 30 countries, there existed a positive correlation between the level of education and family size (UN 1985, p. 66).

It is clear that the effect of education on fertility levels or population growth is not a universal iron law but contingent upon a host of other contextual factors (of a geographical, demographical, social, cultural, level of scientific and technological development, political and religious and life and world philosophical kind). While the example of fertility levels or population growth was taken above, it can be substituted with any other societal outcome of education (such as economic growth, eradication of unemployment, creating a culture of respect for human rights, entrenching a culture of democracy, creating social capital, or whatever, or the promotion of modernisation). These statements pertaining to the effect of education in accomplishing one tenet of modernisation (lower levels of fertility or lower population growth rates) can be extrapolated to any of the (many) other tenets of modernisation. There is no universal law of education that results in modernisation (or in any other predetermined societal outcome). In Chapter 1, the increasingly complex nature of societal contexts that scholars of comparative and international education face was highlighted, but it was also argued that this should not result in scholars resigning to 'Rossi's Iron Law' or succumbing to 'contextual paralysis', but rather, this contextual puzzle unfolding in the contemporary world underscores the élan for the affirmation of the Global South in the field.

One remark regarding a common knee-jerk reaction of scholars in the field in responding to the failures of education to catalyse modernisation in the Global South is to call for more radical experiments in the conceptualisation of 'modernisation' or 'development' (for lack of better words) appropriate to Global South contexts, as well as more radical

3. The differential growth rates of this population, between the Global North and Global South, are of pivotal significance to the thesis of this book and will be unpacked in more detail in Chapter 10.

conceptualisations of education and of education for 'modernisation' or 'developments' in these contexts. At the occasion of the celebration of the 30th anniversary of the *International Journal of Educational* Development in 2009, editor Simon McGrath concluded his lead article, surveying 30 years of articles published in the journal and in the field of development education in general, with its record of despondently frequent lack of success, with a call for the scholarly community to imagine more radical futures (McGrath 2010, p. 542). However, the track record of such attempts, which will be the focus of the next section of this chapter, is far from encouraging.

Alternatives to modernisation and the conventional model of development

The 20th century is full of experiments by nations, especially in the wake of independence from erstwhile colonial rule, with alternatives to the historical (Western) model of development and modernisation. However, there is a discouraging record of economic hardship and devastation and flagrant disrespect for human rights and human lives that emanate from many of these experiments. Some of the most salient of these will now be discussed.

China

Mao Zedong's 'Great Leap Forward' in China (1958–1962), a forced, ideologically driven programme of societal transformation towards a communist economy and society, resulted not only in no economic gains but also the deaths of 30 million Chinese citizens because of famine, with about the same number of births lost or postponed (Smil 1999). At the end of this exercise, Mao Zedong himself admitted it was a failure (Johnson 1983, p. 545).

Cambodia

While the Great Leap Forward was an attempt to not only collectivise agriculture but also create an industrialised economy on the Stalin model, Pol Pot's attempt at societal transformation in Cambodia in the late 1970s forced urban dwellers to return to the countryside and become involved in an agricultural economy, abolished money and forced all people to wear the same black clothes. This project also ended not only in economic disaster but also in untold human suffering and atrocities. Pol Pot's reign of terror in Cambodia – graphically illustrated in the 1984 film 'Killing Fields' – led to the deaths of more than 10% of the population of the country (Ferguson 2021, p. 36).

Cuba

Cuba is another example of a case of radical deviation from Western ways in an attempt to transform society and has often been held up as a poster child or source of inspiration or model. It should first be mentioned that the reconstruction of the Cuban education system after the communist takeover in 1959 has widely been hailed among progressive comparative and international education scholars as being exemplary. Robert Arnove, for example, writes that in the worldwide history of adult literacy campaigns, the three most successful are that of Cuba in 1961, that of Nicaragua in 1980 and that of Tanzania in the 1970s (Arnove 1982, p. 433). A good modern-day example of the excesses and aberrations of Phase 1 in the history of the field (as explained in ch. 1) is Jonathan Kozol's (1978) *Children of the Revolution: A Yankee Teacher in the Cuban Schools*, a book on Cuban education wherein an American writes about his experience as a teacher in a school in Cuba. However, the shortcomings of this book were pointed out in a book review of that publication by leading comparative education scholar Erwin Epstein (1979). The Cuban experiment began with Fidel Castro coming into power in 1959. Already back in 1981, it was found that since Castro took over the government of Cuba, the country had had an annual average per capita growth rate of −1.2% (Johnson 1997, p. 723). By 1990, this growth rate dropped even further to an average annual growth rate of −2%. To keep the Cuban economy running (even at its paltry performance levels) in the 1980s, the Soviet Union had been subsidising the Cuban economy at a rate of US$11m per day (Johnson 1997, p. 723). By the mid-1990s, Cuba had the lowest standard of living in the Western Hemisphere, with the possible exception of Haiti (Johnson 1997). Any commendation of Cuba is negated by its emigration figures, as Cubans have voted with their feet. In the 1960s alone, over a million people had fled from Cuba (Johnson 1997, p. 723). An indication of the loss of human talent in Cuba is the role of the Cuban community in the USA. By the second half of the 1990s, they had established 750,000 new businesses, and their 2 million members produced a GDP eleven times greater than that of Cuba (Johnson 1997, p. 723).

Tanzania

During the first decades after independence, and especially after the violent overthrow of Kwame Nkrumah's government in Ghana, Tanzania was widely hailed as a model of an indigenous, contextual, decolonised-based model of 'development' in sub-Saharan Africa. Indeed, founding independence President Julius Nyerere's 1967 Arusha Declaration, in which he proclaimed the new philosophy of '*Ujaama*' [self-reliance] as henceforth being the driving philosophy of development in Tanzania, had an important education component, 'education for self-reliance'. *Ujaama* and education for self-reliance represented the sharpest break from colonial models of development and education in sub-Saharan Africa during the first post-independent decade (Wolhuter 2004):

> President Nyerere's pamphlet 'Ujaama' (1962) was presented as the official line of thought on African socialism and was followed through in the Arusha Declaration of 1967. 'Ujaama' is a Swahili word meaning 'familyhood' and, according to Nyerere, encapsulates the concept of African socialism as being based on 'the extended family [...] a person regards all people as his brethren [...] as members of his ever-extending family' (Bell 1986, p. 117; Cameron & Dodd 1970, pp. 158–160). The Arusha Declaration of 1967 set Tanzania at that time on a trajectory what was at the time a trial-blazing and nothing short of a revolutionary approach to national development. Development that was to take place in the mode of self-reliance, drawing on Tanzania's own internal resources, particularly its 'people' and 'land'. Development should be rural development built upon traditional structures. The foundation of rural development should be communal ownership of land and other means of production (Bell 1986, pp. 121–124). (n.p.)

This project, however, failed dismally, and by the end of the 1980s, Tanzania was one of the poorest countries in Africa and one of the first to resort to the World Bank for a bailout (some hard statistics of Tanzania's economic predicament are detailed in ch. 5).

□ Four Asian Tigers

The Four Asian Tigers, that is, Singapore, Hong Kong, South Korea and Taiwan, are often cited as exemplary cases of development outside of the West. Alongside these countries is Japan, historically the first of the East Asian miracles, often paraded as a case where transformation (or then modernisation) has been based upon the indigenous cultural basis rather than on imported models from the West. This is used to explain the success of Japan compared to the frustrated attempts in the rest of the extra-Western world (and anthropologists of a previous generation, especially, were keen on making this statement so as to validate the merits of their own field of study) (see Waswo 1989). Yet, as far as its education modernisation is concerned, the formation of a Japanese public education system after the Meiji Restoration in 1868 is often taken in comparative education textbooks (e.g. see Stone 1983, p. 21), cited as a classical example of borrowing (Phase 2 in the development of the field, as explained in ch. 1). The new government issued a decree whereby knowledge would be collected from the entire world, to be used in the construction of a new education system (Idenburg 1975, p. 181). So, in the building of a new education system for Japan, the component of centralised education management and administration was copied from France, pragmatism and models of pedagogies, learning methods, textbooks and teacher education were imported from the USA and all these were balanced with the importation of idealism from Germany (Stone 1983, p. 21).

Singapore is likewise paraded as a backwater in the world, which effected its transformation into a developed country within one generation of attaining independence. Moreover, education is held up as one of the pivotal factors in the equation effecting this miraculous transformation (see Wolhuter 1997). Moreover, Singapore coming out on top in the PISA tests has resulted in the Singaporean education system being looked up to as a model education system from which other nations can learn (see Hang & Brent Edwards 2023).

Perhaps the most thorough and authoritative source on the Singapore miracle is the book by the founding president of independent Singapore, Lee (2000). In this book, *From Third World to First: The Singapore Story, 1965–2000*, Lee Kuan Yew tells the history of independent Singapore. In this book, he explains that in steering the independent undeveloped Singapore from 1965, he and his party actually followed the Western model (Lee 2000, pp. 318–319), with one or two exceptions, such as that Singapore did not follow the Western tradition of a free press (Lee 2000, p. 166), but these differences can hardly explain the Singapore exception to many other erstwhile undeveloped countries. He does, however, strongly denounce practices of corruption, nepotism and cronyism, which incur much damage in many other Global South societies and economies and also attributes Singapore's success to the absence of such practices and the zero tolerance of Singapore with respect to these (Lee 2000, pp. 348–349). At the same time, Lee (2000, pp. 348–349, 490–492) acknowledges Confucian heritage and values as part of the reason for the success of Singapore (although it should be mentioned that he neither supplies empirical validation for this statement nor does he spell out what exactly 'Confucian values' mean, other than general statements about attaching value to the family and to having a sound work ethic).

Lee (2000, p. 58, 95 *et seq.*, 426) does mention the role of education as a pivotal factor in Singapore's trajectory to development. However, his mentioning of education is but a tiny part of his reconstruction of the Singapore experience. Furthermore, there is no distinguishable difference between the Singaporean education system and that of the typical Western nation. In fact, in at least one important aspect, the Singapore education system moved even closer to that of the erstwhile colonial power. Lee was resolute that English should be the sole official language of Singapore, resisting (against strong opposition, even within his own party) to make Chinese (Mandarin or Hokkien), that is, the language of the majority of Singaporeans, or Chinese and Malay and Tamil (the two largest minority groups) the official language. This language policy also stretched into the education sector. For example, the medium of instruction of a top university in Singapore, Nanyang University, was changed, at the personal orders of Lee Kuan Yew, from Mandarin to English.

In the building of South Korea in the post-Second World War and post-Korean War era, great value was attached to education (Lee 2000, p. 319). Yet apart from the 'examinations hell' (that is, the very high-stakes secondary school termination examinations) and the extensive 'shadow education system' (system of supplementary private tutoring) which that system has spawned (and which it shares with the education systems of the other Four Asian Tigers nations), it is difficult to fathom how the education system in Korea differs from that of the West (cf. Lee 2000).

To summarise, alternatives to the model of development track laid and bequeathed by the West have been tried. However, most of these ended in untold human suffering and economic misery. Those who did succeed are few and far between. This scarcity of alternative models is aggravated by three factors. Firstly, it is difficult to pinpoint exactly what the key to their success was. Secondly, many of these alternatives have elements in their societal ecology that (at least from the premises on which this book has been written) are unacceptable (mainly related to violations of human rights and undemocratic policies and practices). Thirdly, in so far as education in particular is concerned, it is difficult to see how the education systems of these successful extra-Western nations differ substantially from that of the West. For example, the one noticeable difference between Western education systems and that of the Four Asian Tigers is the extent of the occurrence of private supplementary tutoring in the latter. It is difficult to believe that tutoring can explain the economic and societal success of these nations. Private supplementary tutoring is, if anything, very controversial. A comparative and international education scholar who has done most research on this, University of Hong Kong comparativist Mark Bray – who has devoted his 2017 CIES presidential address to this topic (Bray 2017) – when discussing the downside of private supplementary tutoring stated unequivocally and emphatically that he and his wife had decided not to send their children for any supplementary tutoring.

Yet, despite the apparent similarities between education systems of the Western world and those of the Four Asian Tigers, the ground theorem of comparative and international education, as was explained in Chapter 1, is that of the symbiosis between education system and societal context. According to this theorem, an education system not fine-tuned to its societal context is doomed to fail.

Criticism against development and modernisation theory: Parameters

Thus, both the running notion of 'development' and modernisation theory, which held sway in comparative and international education and was for a long time undisputed and which provided the philosophical (if not ideological) underpinning for much of the education expansion in the Global South the past 75 years, have become severely discredited. In view of the fact that much of this education expansion cannot boast the development of modernisation returns that were predicted, and also in view of the contextual interrelationship with education and the contextual sensitivity of education reforms as a central article of faith of comparative and international education (as was explained in ch. 1), such criticism cannot be brushed off lightly.

On the other hand, unconsidered experimentation with conceived alternatives has resulted in a litany of failures, economic devastation and untold human suffering, including the most flagrant disregard for human rights. In extra-Western settings that can be regarded as exemplary models, the essential ingredient and the exact place of education in the equation have remained elusive. This leads to the conclusion that the scholars of comparative and international education still stand at the very beginning of the assignment of teasing out, in Global South contextual settings, exactly what kind of education is required for exactly what kind of 'development' or then what kind of 'societal transformation'. The lack of successful alternatives, the poor track record of tested alternatives, the difficulty in distinguishing substantial differences between successful alternatives and Western models, and in determining the education factor in the equation all also point to the advisability to be modest and cautious in assessing Western models, and in blanketing condemnatiomn of all such models as irrelevant.

This author can accept that Inkeles and Smith's (1974) list of features of modernisation cannot or should not summarily be extrapolated to extra-Western contexts. At the same time, the notion that all cultures are relative cannot be given unlimited validity (a point which will be returned to in chs. 6 and 8). But two points of departure, as fixed beacons or fixed reference points, will be tabled here. The first is what Carlos Torres (2015), comparative and international education professor and UNESCO Chair of Global Citizenship Education, calls the three global commons, what he regards as common ground or yearnings uniting all human beings, regardless of the diversity of context:

- We all have only one planet.
- We all desire peace.
- We all have the right to pursue life, prosperity and happiness.

The second beacon when constructing alternatives is the Creed of Human Rights. License to construct an alternative paradigm of modernisation, development or transformation does not extend to the violation of human rights. As explained in Chapter 1, while not above or absolved from criticism, this Creed of Human Rights also forms the philosophico-ethical superstructure of this book. The growth of the human rights narrative to a full narrative in the field of comparative and international education will be discussed in detail in the next chapter.

Conclusion

Thus, the assignment for scholars of comparative and international education in the forthcoming stage in the evolution of the field is to do research that attempts to tease out the role of education in the context of exemplary models of societal change or transformation or then development or modernisation in Global South settings. Further to these two beacons, what can be suggested for scholars in the field when searching for alternatives to the conventional (allegedly Western-biased) model of development or modernisation or societal transformation is the global initiatives of humanity in formulating and pursuing a future for humanity. These include the MDGs and the SDGs (including its education derivate, the Incheon Declaration). These have been formulated by humanity as a collective (although still within the structures of Northern hegemony). In the next chapter, these projects will be discussed in more detail.

Chapter 3

Criticism against foreign aid and the work of international agencies in the field of education

Abstract

In the post-Second World War era, foreign aid and international agencies have become major actors in the global education project and in education in the Global South in particular. Especially since the 1970s, both foreign aid and international agencies have become the object of harsh criticism as well. This chapter surveys foreign aid and international agencies in education, as well as the criticism these have drawn. The most marked of the international agencies are the World Bank, UNESCO and the OECD. This chapter also finds much that is commendable in the activities and role of these organisations. These include UNESCO's campaign for human rights education, the Education for All movement and the Incheon Declaration, all in which UNESCO played a major role. In a new phase in the evolution of the field of comparative and international education, that of the affirmation of the Global South, scholars should explicate ways in which foreign aid and the activities of international organisations in the Global South can be used to the benefit of people in Global South contexts. In doing this, it is recommended they take their cues from the paradigm of cultural revitalisation.

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Introduction

The belief in the need for development that has held sway since the mid-point of the 20th century and the experienced need of nations of the Global North to win the favour of the nations of the Global South, as explained in Chapter 2, paved the way for a massive industry of foreign aid flowing from the countries of the Global North to the countries of the Global South. Not only foreign aid in bilateral agreements and operations but also international agencies, which came into being as part of the Washington Consensus, operate on a large scale in the Global South, with the stated intention to promote the development of the nations of the Global South. No small part of foreign aid and the projects of international agencies revolve around education. This chapter will focus on these industries of foreign aid and the work of international agencies, in the education sector in particular, as well as the criticisms that have been levelled against their work as actually undermining the interests and progress of the Global South and the need for alternatives as part of the (future) affirmation of the Global South.

The chapter begins with an outline of the development of foreign aid since the middle of the 20th century. Then, the range of criticisms that have been levelled against the principle (as well as the type) of foreign aid is surveyed. Foreign aid for education will then be explored and interrogated. Then, the rise of international agencies' engagement in the Global South is surveyed, and the criticisms levelled against the work of international agencies in the Global South are discussed. After that, the engagement of international agencies, specifically regarding education in the Global South, is placed under the spotlight. The parameters for a kind of foreign aid and engagement of international agencies in the Global South that adequately serves the interests of the Global South and promotes the affirmation of the Global South is the topic of the last section of the chapter.

The rise of the foreign aid industry since the mid-20th century

An instructive event in the West immediately after the end of the Second World War was that of the Marshall Plan, or the European Recovery Program. This was a plan of massive assistance by the USA to a devastated Europe in order to speed up the economic and broader societal recovery of Europe so as to make sure Europe could serve as a bastion against the threatened westward expansion of the Eastern bloc, headed by the USSR. In an address at Harvard University on 05 June 1947, the American Secretary of State, George C Marshall first proposed such a plan. Representatives of sixteen West European countries met in Paris in July 1947 and, by 24 September that year, submitted to President Truman a plan for mutual aid and self-help as a counterpart to financial aid from the USA. The plan of the Western countries made provision for US$22.24bn worth of food, fuel, raw materials and capital equipment over what they (the Western countries) could afford (Black & Helmreich 1975, p. 646). Of this, US$3bn could be expected from the International Bank and other forces. On 03 May 1948, the law providing for the Marshall Plan was signed by the president. Till the end of the programme in 1963, Western Europe received a total of US$39.3bn in aid. The Marshall Plan is generally regarded as the most successful venture in foreign affairs ever undertaken by the USA (Black & Helmreich 1975, p. 647).

The global geopolitical chessboard after the Second World War was the one prescribed by the Cold War of the time: the Western bloc (the USA, Canada and the states of Western Europe) against the Eastern bloc (the USSR and the states of Eastern Europe, together with China). These two blocs were engaged in a race with each other to rope the developing countries into their spheres of influence in (these countries were located outside of the Western and Eastern blocs, but made up by a significant majority of votes in the UN; furthermore, they were rich in many mineral resources which attracted the superpowers, and many of them were strategically located, which was also important to the superpowers). Spurred by the example or precedent of the Marshall Plan, they, therefore, embarked on foreign aid projects in developing countries in an effort to win the favour of these countries. Foreign aid projects became a massive industry and did not stop at the end of the Cold War in 1989. In fact, in the 30 years between 1990 and 2020, Africa alone was the recipient of US$1.2 trillion of aid assistance (Mills 2021, p. 1).

On 04 September 1961, the USA Congress passed the *Foreign Assistance Act*, which reorganised assistance programmes and mandated the creation of an agency to administer economic development aid. In 1961, USA President John F Kennedy established the United States Agency for International Development (USAID). The United States Agency for International Development became one the largest aid agencies in the world – currently, its annual budget is over US$27bn. USAID has missions in over 100 countries in Africa, Latin America, Asia, the Middle East and Eastern Europe. In the USA, the Peace Corps was also established in 1961 by the executive order of President John F Kennedy and authorised by the USA Congress the following September through the *Peace Corps Act*. The Peace Corps trains and deploys volunteers to provide development assistance in programmes in developing countries. Since its creation, more than 240,000 Americans have served in the Peace Corps in a total of 142 countries (Peace Corps 2022). Upon joining the Peace Corps, members typically sign a 27-month commitment.

In the UK, the Department for International Development was responsible for administering foreign aid during the period of 1997–2020. This department falls under the UK's Secretary of State for International Development. In June 2020, the prime minister of the UK, Boris Johnson, declared that the Department for International Development would merge with the Foreign Office to create the Foreign, Commonwealth and Development Office.

The Nordic countries (i.e. Sweden, Norway, Finland and Denmark) have always been lauded for their generous and advanced development aid policies and practices (Elgström & Delputte 2015, p. 1). The features of the 'Nordic model' include (Elgström & Delputte 2015):

> [*A*] large component of multilateral aid, a strong concentration on the least developed countries and a substantial amount of grants. It is also characterised by considerable attention to the strengthening of democracy, gender, ecological issues and human rights. (p. 1)

The policy of the French government is to allocate 0.55% of the GNI of France to official development assistance (Ministère de l'Europe et des Affaires Etrangères 2020). In 2020, Africa, which is the highest priority of French development aid, received €3.6bn, 39% of all bilateral funding (Ministère de l'Europe et des Affaires Etrangères 2020).

The Deutsche Gesellschaft für Internationale Zusammenarbeit [German Society for International Collaboration] in Germany is commissioned by the German Federal Ministry for Economic Co-operation and Development and has 24,977 employees working in 120 countries (Deutsche Gesellschaft für Internationale Zusammenarbeit 2022). In 2021, Germany spent US$32.2bn on total official development assistance (Donor Tracker 2022).

The Netherlands Development Co-operation is a major part of the Dutch Ministry of Foreign Affairs and is tasked with development funding in developing countries. The Japan International Co-operation Agency (JICA) is a governmental agency that delivers most of the Official Development Assistance for the government of Japan. Apart from governments, there are also initiatives such as the Bill and Melinda Gates Foundation and Bono.

Globally, development aid to developing countries came to an all-time high in 2021, reaching US$178.9bn (OECD 2022b). Education (and culture) has been a strong factor in the foreign aid package. It has been such a strong factor that, together with the politico-diplomatic, military and economic dimensions, Philip Coombs (1964) describes it as a 'fourth dimension' in American foreign relations. The 'underdevelopment' of the Global South would be overcome by a transfer of capital and also by a transfer of technology, with careful guidance in their correct use, and then also by transferring education from the Global North to the Global South.

Criticism against foreign aid

At the same time that the practice of foreign aid gained momentum, a counterforce of criticism against foreign aid has gained momentum. This criticism revolves around four interrelated objections and, lately, a fifth objection. The four interrelated objections are the poor success record of foreign aid programmes, the allegation that foreign aid fosters a culture of dependency, the allegation that foreign aid primarily serves the interests of benefactors and the objection that foreign aid is based on an incorrect development model. The fifth objection that appeared recently is in regards to aid in the nascent or immanent multipolar world.

Foreign aid has, in its own terms and spelled-out objectives, a very poor record of effecting, permanent, sustained change (as foreseen in foreign aid plans). The track record of the Marshall Plan was, regrettably, not confirmed by the many North–South aid schemes that were lodged after the Marshall Plan. Mills (2021, p. 2) draws attention to the massive amount of aid that has been given to sub-Saharan Africa during the 30-year period (1990–2020). Yet, the average annual per capita income in the region increased by a mere US$352 during those years, from US$1,304 in 1990 to US$1,656 in 2019. Donors have spent US$1,111 per person over these 30 years to lift the incomes of Africans by US$352. On the other hand, since the mid-2000s, Africa's share of global income has been dropping steadily. In 1990, the global average annual per capita income stood at US$5,473.19 (World Bank 2022). In 2019, it came to US$17,534.40 (World Bank 2022). Clearly, the gap between Africa and the rest of the world, at least measured by this metric of annual per capita income, is yawning.

Former World Bank economist William Easterly, in a series of publications, demonstrated the poor track record of foreign aid (see Easterly, 2006, 2007a, 2007b). Easterly (2006, p. 4) comments that succeeding in getting 12-cent medicines to children could prevent half of all malaria mortalities. In his book, *A Farewell to Alms*, Gregory Clark (2007) of the University of California at Davis argues that changes in behaviour rather than charity (i.e. giving aid) are the key to economic advancement in the post-industrial world.

Then, there is the objection that the practice of aid is fostering a culture of welfare dependence, undermining agency, self-esteem and stifling initiative, making recipient communities passive and promoting a culture of a lack of accountability. It was the first president of an independent Tanzania, Julius Nyerere, who reputedly remarked that '[...] a foreign aid worker is someone who comes to your country to borrow your watch in order to tell you the time'. In her best-selling book, *Dead Aid: Why Aid Is Not Working and How There Is a Better Way for Africa*, Zambian author Dambisa Moyo (2009) argues that aid deletes the link of accountability between politicians and the citizenry, crowds out much-needed investment, undermines the competitiveness of labour-intensive export sectors, cultivates a culture of dependency and facilitates runaway and large-scale corruption, including rent extraction. It also tends to nurture a culture of policy laziness on the part of leaders. For these reasons, she argued that a much more promising road towards development would be to make better use of international bond markets, large-scale investment in infrastructure and cheaper financing for small- and medium-sized entrepreneurs.

These sentiments were echoed by Nana Akufo-Addo (2019), president of Ghana, when he said at a United Nations Development Programme (UNDP) conference in Ghana in November 2019:

> When I talk about Ghana or about Africa [...] I am simply insisting that we use our resources to build robust economies that will propel us into the likes of the developed nations of the world. I am insisting that we stop believing that our deliverance will come from benefactors. I am insisting that we take our fate in our own hands and work to bring us where we do not look for or expect charity. (n.p.)

Thirdly, the objection is levelled that the underlying motivation for aid is to serve the interest of the benefactors rather than the beneficiaries. As was explained earlier in this chapter as well as in the preceding chapter, the entire industry of the Global North dishing out aid to the Global South was hatched during the Cold War (and undoubtedly also gained new impetus in the present global geopolitical calculus where China's 'road and belt' policy and an assertive Russia, as well as a not-friendly Iran and North Korea, all stand in the way of the persistence of the unipolar dispensation of the Washington consensus or *Pax Americana*). Among the conflict paradigms of the Heterodoxy Phase of the 1970s (explained in ch. 1) are a host of scholars who have advocated dependency theory. Dependency theorists such as Martin Carnoy (1974), Robert Arnove (1980) and Philip Altbach (1982) contend that the industrialised Global North countries dominate the economic and educational systems of the nations of the Global South and that such arrangements work to reinforce existing inequalities and keep the Global South dependent on the Global North (Wolhuter 2001, p. 16; see Griffiths 2021). In the most recent CIES presidential address, Karen Monkman directs a scathing attack against private foundations as actors in foreign aid projects in the Global South. Drawing on both cited sources and her own experience, she accuses private foundations of having their own agenda and many of not having a thorough knowledge of the field (Monkman 2022). On the prominent place of celebrity persons in many foreign aid projects, Monkman (2022) states:

> Celebrity involvement usually takes the form of advocacy [*instead of beneficiaries deciding for themselves*]. For example, celebrities offer their names and images – their 'brand' – to organizations or initiatives as a way to magnify public awareness of particular development efforts. (n.p.)

Fourthly, criticism is expressed that foreign aid is based on the wrong model, that is, on the model of the benefactor societies (the West or the Global North). As was explained earlier in this chapter and in Chapter 2, the dominant model of development (upon which the global aid industry has been predicated) has been criticised as being based on the Western experience, not necessarily appropriate to extra-Western contexts.

Finally, Mills (2021, p. 200) drew attention to the fact that in an increasingly multipolar world, replacing the unipolar world of the Washington Consensus or *Pax Americana* of the last 35 years, the hitherto developed pattern, where the Western powers – at least to some, if not a significant extent – have made the supply of aid contingent upon recipients instituting a host of policies. These policies link up with what Western powers themselves practice at home, such as neoliberal economic policies, accountable and transparent governance, democratic rule, supremacy of law and, above all, respect for human rights. These will not apply in the case of many new donors on the scene, as many do not have these policies at home. On the contrary, as Mills (2021, p. 200) puts it, many of these donors 'would presumably relish their absence'. In a well-researched and thoroughly argued volume, Hillman (2021) paints a concern-raising picture of how China's current outward drive is putting both the Global North and the Global South in an iron grip of hegemony. The controversies surrounding the Confucius Institutes (see Lum & Discher 2022) and of the presence of Huawei in the USA (see Bartz & Alper 2022) come to mind here as well.

These new players in the global aid industry represent an important new factor in the assessment of the foreign aid industry for the thesis explored, unpacked and argued in this book. As was explained in the preceding chapters (this theme will be taken further at the end of this chapter and in ensuing chapters), this book has been written as part of a larger research project on human rights education by the author, who subscribes (though not uncritically) to the moral code of human rights, with this moral code of human rights occupying an important place in the framework or parameters set to the envisaged and craved-for affirmation of the Global South in global education and within the scholarly field of comparative and international education.

The work of international agencies in education

Closely intertwined with development aid has been the engagement of international agencies in education. International agencies constitute a formidable player in education in the world (see Anderson-Levitt &

Gardinier 2021, p. 11). With a prolific list of scholarly publications – both in in-house publications and peer-reviewed academic journal articles – many international organisations are now among the largest research producers, overshadowing even leading universities, specifically in the education sector (Zapp 2018). International organisations' role in global educational governance is typically depicted as an outcome of their regulative or normative power (Zapp 2021, p. 1022). Rose (2003, p. 81) writes that in Malawi, international agencies supply 40% of the resources for education. In the case of Russia, Aydarova (2021) has shown the pivotal role of Russian academics who consulted for the World Bank in shaping education policy in Russia. Other examples of where international organisations have significantly shaped education reconstruction are the operation of the European Commission in France and Kosovo, the World Bank in Russia and Kosovo, United Nations Children's Emergency Fund (UNICEF) in Kosovo, and the OECD in Sweden, France, Russia, Uruguay and the USA (Anderson-Levitt & Gardinier 2021, p. 11).

The role of international organisations in education (in the Global South specifically) and of foreign aid has been anything but an unqualified success. This role has also been criticised. This criticism will be discussed later in this chapter, when a number of the most salient features of these organisations will be brought into focus. But the general trend of this criticism revolves around the commercialisation or marketisation of education, and as such, when it comes to the Global South, how these agencies tend to strengthen the hand of Northern hegemony (see e.g. Robertson 2017). International organisations are often portrayed as a tool of powerful states (i.e. the Global North) imposing their ideas on weaker states (Zapp 2021, p. 4024). Classic examples are the World Bank and International Monetary Fund's attaching conditionalities for borrowing money to the governments of the Global South (Jones 2007; Moutsios 2009) (the role of the World Bank and International Monetary Fund [IMF] on education in the Global South will be discussed in more detail in ch. 5). Besides these harder ways of shaping policies in the Global South, there are also the softer ways, that is, the normative contours spelled out by the international organisations (Zapp 2021, p. 4024). In an interesting, more nuanced portrayal of the work of these international agencies in global education governance, Mike Zapp (2021) argues that science is the primary source of legitimacy in global education governance, albeit working through these international agencies as conduits to shape education. Rizvi and Khamis (2020) demonstrated how international agencies have foisted down expensive teacher education programmes of long duration on Pakistan, in a context where such programmes were ill-fitting and in a context which asks for cheaper, alternative teacher education models.

A number of the most salient international agencies involved in education work will now be discussed. The three most forceful intergovernmental organisations (IGOs) in global education are the OECD, UNESCO and the World Bank (Zapp 2021, p. 1023).

The World Bank

The most marked instance of these agencies is certainly the World Bank. In fact, according to Altbach (1991, pp. 502–503), by the mid-1980s, the World Bank had become the single biggest publisher of comparative education literature in the world. Moreover, by the mid-1980s, the World Bank had also become the major international organisation for the funding of education reform globally (Arnove 2012, p. vii). An indication of the place of education in the World Bank programme is that George Psacharopoulos (2006) (CIES president in 1990 and currently an adjunct professor of Global Human Development at Georgetown University, Washington DC) served at the World Bank as senior advisor to the Vice President, Human Capital and Operations Policy, chief of the Human Resources Division and chief of the Education Research Division.

Through its offspring, the International Development Association (IDA), The World Bank supplies interest-free loans and grants to governments of the most poverty-stricken nations (Spring 2008). In the 1970s, under the Presidency of Robert McNamara, the World Bank self-styled itself as a development aid agency (Rose 2003, p. 67). In the 1980s, it saw its mission as being a bank of knowledge (Rose 2003). According to its 'knowledge economy' principle, the World Bank believes that knowledge is the most powerful instrument for economic development.

Initially, from its establishment in 1945 until 1963, the World Bank did not have an explicit policy on education (Psacharopoulis 1963). However, from 1963, the World Bank has shown a keen interest in matters around education. In the first stage (1963–1987), the bank focused on human resource planning, then shifted its focus to vocational and technical education. Loans supplied during the 1960s and the 1970s were mostly for technical-vocational education at the secondary and post-secondary levels. More recently, in line with the MDGs, emphasis was laid on primary and basic education with the objective of including lifelong learning as a foundation for human resource development. In the 1990s, the World Bank joined forces with the UNDP, UNESCO and UNICEF in the Education for All initiatives (Mutamba 2014, p. 4).

World Bank publications on education fit squarely in the modernisation theory framework (Wolhuter 2001, p. 14) or, more narrowly, on the role of education in the generation of human capital (Rose 2003, p. 77).

Human capital is then regarded as the key to the accomplishment of the entire gamut of modernisation or desired objectives. During his tenure as the World Bank's Chief Economist, Josef Stiglitz (1997, p. 22) stated that building human capital can promote economic development, equality, participation and democracy, and in this way, education is 'the core of development'. In this regard (human capital formation), rates of return analyses as metrics have been pivotal in steering World Bank policy directives on education (Bennell 1996). The World Bank landmark report on education in sub-Saharan Africa (1988), for example, based its argument for the expansion of education in sub-Saharan Africa and for giving priority to primary education on the premise that rates of return to education exceed rates of return to other areas of investment and that rates of return to primary education are substantially higher than rates of return to secondary or higher education – this premise is set at the outset of the report and substantiated by hard statistics (World Bank 1988, p. 22), that is, education is the key towards economic development and modernisation in Africa. Similarly, in a more recent World Bank publication, which has attracted much attention, on the imperative for developing more indigenous languages in the world as languages of learning and teaching in education institutions, the argument is based on a number of considerations, but culminates in arguments on the positive effect this has on the cognitive development of learners and on their academic achievement in general, their acquisition of English, and on arguments of more internal efficiency in education and especially on the strength of the argument that this arrangement (using the vernacular as the language of learning and teaching) creates more human capital (World Bank 2021).

From the quarters of the comparative and international education scholarly fraternity, much criticism against the education involvement and activities of the World Bank has appeared (e.g. Auld, Rappelye & Morris 2019; Klees, Samoff & Stromquist 2012). While the main thrust of such criticism is the World Bank's narrow conceptualisation of education as the formation of human capital (Rose 2003, p. 67, 82), much of this critique supports the argument against Northern hegemony in education and Northern hegemony in comparative and international education, as well as the argument against the neoliberal economic ideological or philosophical underpinnings of this involvement and activities (the neoliberal economic revolution and its impact on education and objections against that will be the focus of attention in ch. 5). It is especially the social justice lobby or narrative in comparative and international education (see Wolhuter, Espinoza & McGinn 2022) which, from the side of the social justice considerations, criticises the work of the World Bank in education. An example is the study by Rose (2003, p. 68), which draws attention to the fact that Malawi was the first country in the 1980s to (re)introduce primary school fees, on the advice of the World Bank. The already low completion rates in primary schools dropped even further after the increase in fees was brought about in 1982. By the mid-1980s, only 13% and 23% of female and male children, respectively, entering Standard 1 successfully completed primary school (Rose 2003, p. 75). Rose criticises the World Bank for not factoring in what effect their education policy prescriptions will have on gender equality in education (Rose 2003, p. 75). Rose (2003, pp. 82–83) also contends that the World Bank's fixation on input–output (rates of return) strengthens the 'black box' mode of thinking about education – pointed out in Chapter 1 as one of the problems besetting the field of comparative and international education.

The Organization for Economic Co-Operation and Development

Another international organisation that has been actively involved in matters of education is the OECD. This organisation was formed in 1961, with its stated purpose to 'build better policies for better lives' and 'to shape policies that foster prosperity, equality, opportunity and well-being for all' (OECD 2022b). The OECD brings together governments, policymakers and citizens to develop evidence-informed international benchmarks and find solutions to a variety of social, economic and environmental problems (OECD 2022b). These range from raising economic output and creating employment to promoting quality education and countering international tax evasion (OECD 2022b). In pursuing these activities, the OECD supplies a unique common discussion base and knowledge repository for data and analysis, exchange of experiences, learning of best practice from others and counselling on public policies and international benchmarking (OECD 2022b). The OECD has 38 member states. These member states are (Mayar 2022):

- Australia
- Austria
- Belgium
- Canada
- Chile
- Colombia
- Costa Rica
- Czech Republic
- Denmark
- Estonia
- Finland
- France
- Germany

- Greece
- Hungary
- Iceland
- Ireland
- Israel
- Italy
- Japan
- South Korea
- Latvia
- Lithuania
- Luxemburg
- Mexico
- Netherlands
- New Zealand
- Norway
- Poland
- Portugal
- Slovakia
- Slovenia
- Spain
- Sweden
- Switzerland
- Turkey
- the UK
- the USA.

In matters of education, the most salient work of the OECD is the conducting of the PISA tests. These are a series of tests conducted every three years, which attempt to evaluate education systems worldwide, by testing the skills and knowledge of fifteen-year-old students. Since the year 2000, every three years, fifteen-year-old students from randomly selected schools worldwide (these are schools in the OECD member states as well as those outside of the OECD) take tests in the key subjects of reading, mathematics and science, as well as knowledge and skills to meet real-life challenges. These tests measure competencies (i.e. do not revolve around the measurement of content). Since 2000, 90 countries have participated in the PISA tests, and 3 million students have written the PISA tests. The 2022 round of PISA tests focuses on mathematics, with an additional test on creative thinking. The test has been conducted in 38 OECD member countries as well as in 50 non-OECD countries. PISA 2025 will focus on science and will include a new assessment of foreign languages. It will also include the innovative domain of learning in the digital world, which aims to measure students' ability to engage in self-regulated learning while using digital tools.

The OECD has promoted the objective of competencies through PISA and has coerced participating countries through a variety of means, including its (OECD's) country reports, to similarly include competencies in their curricula as goals of education (Anderson-Levitt & Gardinier 2021, p. 2; Martens & Jakobi 2010; Takayama 2013). Nordin and Sundberg (2020) demonstrated how OECD studies have informed Sweden's reform to introduce competency-based education policies. International league tables, or international large scale education surveys, of which PISA is the most marked, have made a forceful impact on comparative and international education (see Van de Vijver, Jude & Kuger 2019). The availability of these large databases is evident in trends in research in the field, as a sources of data and also in research foci (Wolhuter, Espinoza & McGinn 2023; also see Carnoy 2019). A striking example of the latter is the sharp rise in studies focusing on student achievement, which can be connected to the availability and use of large databases (Wolhuter et al. 2023; also see Carnoy 2019). This is a heartening development in the field in that it signifies a breaking from the 'black box' character of the field (see ch. 1). The utilisation of these international league tables in research also represents a resuscitation of the positivist or quantitative research tradition in the field, which was strong in the social science phase in the development of the field in the 1960s (see ch. 1), but which was neglected. It has also given new impetus to the practice of educational borrowing from what is regarded as exemplary education systems to improve the domestic education project (Phase 2 in the historical evolution of the field of comparative and international education; see ch. 1). In a case such as Singapore, Hang and Brent Edwards (2023) reported how this country has even used the status it gained, inter alia, by coming out on top in PISA tests, a top education system in the world, to market itself as an education export nation.

On the contrary, these large databases and their role in education and in the field of comparative and international education have also been harshly criticised. This criticism revolves around the mechanistic reduction of education and also how these league tables promote a culture of performativity in education and the marketisation of education, and play in the hand of the neoliberal economic revolution, and therefore, by implication Northern hegemony in the global economy. Central in the comparative and international education literature critical of international large-scale testing regimes (PISA in particular) and their impact on global education policymaking and education reform is the volume entitled *PISA, Power and Policy: The Emergence of Global Educational Governance*, edited by State University of New York (SUNY) at Albany comparativists Meinz-Dieter Meyer and Aaron Benavot (2013). Six years later, that was followed by another edited volume by Florian Waldow and Gita Steiner-Khamsi (comparative education professor at Teachers College, Columbia

University), *Understanding PISA's Attractiveness: Critical Analyses of Comparative Policy Studies* (Waldow & Steiner-Khamsi 2019). The disproportional adverse impact that these test regimes have on the Global South has also been highlighted (see e.g. Solano-Flores 2019). Mariaan Lockheed (2013) argued that the PISA regime rendered the developing countries rather vulnerable to a regime of testing reflecting the interests of the international capitalist world with their headquarters in the Global North when many international aid agencies make the granting of aid contingent on improvement of achievement in the PISA tests.

The volume edited by Meyer and Benavot (2013) provides an explication and holistic picture of how contemporary power relations in public education policy are characterised by much-reduced state agency over educational decision-making and increased drawing on international organisations such as the OECD. It highlights and problematises the role that PISA plays as an instrument for strengthening accountability and benchmarking in the participating countries and contends that these changes in power have effected fundamental shifts in public education. The public education project was recast from a project with the objective of educating national citizens and cultivating social solidarity to an industry driven by the economic demands and the dictates of the labour market.

Suter (2019, p. 200) enumerates the more technical challenges of large-scale international assessments as follows:

- Defining the required content of subject matter for all countries so as to render the test fair to all nations.
- Questioning whether questions translated into another language would make for a comparable assessment of respondents in varied historical, cultural and social contexts.
- Questioning whether variation in curriculum content and practices from one national education system to another may not overwhelm the common thrust of an increase in student learning.
- Defining the problem of how to be certain that tests, asking students a limited set of questions written on paper or a computer about mathematics, science or reading can constitute a valid measurement of the student's ability in that entire subject area.
- Defining the problem of being certain that a measurement obtained from a self-administered test can provide enough data to be of any value to a teacher trying to help the students learn.

One of the most scathing criticisms against the OECD cum PISA role in education is the so-called Finnish Paradox (see Meyer & Benavot 2013, pp. 51–116; see also: Sahlberg 2010, 2016). This Finnish Paradox is the remark that the Finnish education system, which came to be regarded as the global model after Finland came out, unexpectedly, in the first position in the first round of PISA tests in 2000, is actually the opposite of what the OECD promotes. Instead of rigid regimes of performativity, performance appraisal and accountability, the Finnish education system is remarkably exceptional for its lack of rigid assessment or testing regimes and prescriptions to teachers; teachers are granted much professional autonomy.

UNESCO

In 1945, UNESCO was set up as an organ of the UN. The atrocities of the Second World War were the direct reason for the creation of this organisation. The contention was that because war begins in the minds of people, the best way to stop and eradicate wars is, similarly, to change the mindset of people, that is, to ensure everlasting peaceful co-existence through education. Thus, UNESCO was set up as a part of a strong act of faith of nations having been through the unpalatable experience of two world wars within one generation, believing that political and economic structures are not enough to guarantee permanent peace (UNESCO 2016a). Peace should be ensured by humanity's moral and intellectual cohesion (UNESCO 2016a).

UNESCO (2016a, n.p.) aims to construct interrelations between nations that will result in this kind of solidarity by:

- Mobilising for education so that every child has access to quality education as a fundamental human right and as a prerequisite for human development.
- Building intercultural understanding through the protection of heritage and support for cultural diversity; UNESCO created the idea of World Heritage to protect sites of outstanding universal value.
- Pursuing scientific co-operation, such as early-warning systems for tsunamis or trans-boundary water-management agreements to strengthen ties between nations and societies.
- Protecting freedom of expression as an essential condition for democracy, development and human dignity.

While UNESCO has done much since its inception in terms of research on education and the expansion of education, as well as promoting human rights education (more on that follows later in this chapter), it should also be mentioned that the organisation has drawn its share of criticism too. It has been criticised from both sides of the ideological spectrum: the liberal and social justice lobby at the one end and the conservative establishment on the other. An example of the latter is when, in the 1980s, for a time, the USA withdrew from UNESCO and the UK threatened to do the same for the alleged anti-Western bias of the organisation (Anon. 1983).

One area of labour of UNESCO that needs to be singled out is its promotion of human rights education. The reasons for singling out this aspect of the work of UNESCO are that, firstly, this book has been written from the vantage point of human rights education (cf. ch. 1) and, secondly, the fact the human rights narrative has grown to be one of the four basic narratives in the field of comparative and international education (cf. ch. 1, as well as Wolhuter et al. 2022).

The human rights narrative in comparative and international education

This narrative is predicated upon the basic axiom that all human beings are entitled to basic, natural and unalienable rights. The Creed of Human Rights has evolved over a period of two centuries in the West (Wolhuter 2019, pp. 39–64). By a series of events, among which two key events were the creation of the UN in 1945 and its Universal Declaration of Human Rights in 1948, the Creed of Human Rights, and as part of the set of human rights, the right to education was internationalised till it became a moral code and order for a globalised world (Prozesky 2018) and as such constitute one of the major forces driving the global education agenda (see Wolhuter & Van der Walt 2019).

According to Wolhuter and Niemczyk (2023), it may be surmised that:

> The Creed for Human Rights thus became a rationale for the expansion and reform of education worldwide. Initiatives at expansion and reform of education, in the name of human rights were launched by national governments and by international bodies (such as, UNESCO). To clarify the concept of Human Rights Education, Article 2 of the United Nation's Declaration on Human Rights Education and Training, dated 20 December 2011, describes Human Rights Education as comprising education about human rights, education for human rights and education through human rights:
>
> 1. Education about human rights, which includes providing knowledge and understanding of human rights norms and principles, the values that underpin them and the mechanisms for their protection.
> 2. Education through human rights, which includes learning and teaching in a way that respects the rights of both educators and learners.
> 3. Education for human rights, which includes empowering persons to enjoy and exercise their rights and to respect and uphold the rights of others (UN 2011). (n.p.)

The UN declared the ten-year period from 1995 through 2004 as the 'UN decade for human rights education', and at the conclusion of this decade, in December 2004, the General Assembly of the UN 'launched the World

Programme for Human Rights Education "as a global initiative, structured in [*sequential stage*], to [*promote*] the implementation of human rights education [*everywhere*]"' (Froese-Germain & Riel 2013, p. 1). 'The first phase of the programme (2005–2009) focused on integrating human rights education into elementary and secondary school systems' (Froese-Germain & Riel 2013, p. 1). 'The second [*phase*] (2010–2014) [*concentrated*] on [*infusing*] human rights education in higher education systems [*and in the*] training [*of*] civil servants, law enforcement officials and military personnel' (p. 1). UNESCO published a Plan of Action: World Programme for Human Rights Education in 2006 (UNESCO/Office of the United Nations High Commissioner for Human Rights 2006).

UNESCO, Jomtien, 1990: Education for All[4]

A major global education initiative, which was launched under the auspices of UNESCO and enthusiastically embraced by the global community was the Education for All drive. In 1990, delegates from 155 countries, together with representatives from 150 governmental and non-governmental organisations, agreed at the World Conference on Education for All in Jomtien, Thailand (05–09 March 1990) to render primary education accessible to all children and to massively reduce illiteracy by the end of the decade (UNESCO 2016a). The conference adopted the World Declaration on Education for All (or 'Jomtien Declaration') (UNESCO 1990). The aim of making universal access to primary education was spelled out in the declaration. Other main tenets of this document include a focus on learning, a wider meaning attached to basic education and the strengthening of partnerships in working towards realising the aim of Education for All.

UNESCO, Incheon, 2015: The global community's vision for education in the world in 2030

As a response to the ecological threat but also other problems facing humanity, the international community has selected seventeen SDGs as its collective vision for the world by 2030. On 25 September 2015, the General Assembly of the UN adopted Resolution 70/1: 'Transforming our world: the 2030 agenda for sustainable development' (UN 2015). Goal 4 of these seventeen SDGs deals with education. Goal 4 is stated as follows: 'Ensure inclusive and equitable quality education and promote lifelong learning opportunities for all' (UN 2015, n.p.).

4. This section is based on the published material by De Beer & Wolhuter (2020, pp. 29–54).

From these seventeen SDGs, the latest global education initiative, the Incheon Declaration, 2015, was born. UNESCO, together with the UNICEF, the World Bank and a few other organisations convened the World Education Forum 2015 in Incheon, Republic of Korea, from 19 to 22 May 2015. Over 1,600 representatives from 160 countries, which included over 120 ministers, heads and members of delegations, heads of agencies and officials of multilateral and bilateral organisations, and representatives of civil society, the teaching profession, youth, and the private sector, drew up and approved of the Incheon Declaration for Education 2030, SDG 4. This document spelled out a new vision for education in the world for the ensuing fifteen years. This plan expands or unpacks the vision of inclusive and equitable quality education and lifelong learning for all, that is, SDG 4. The Incheon Declaration has as its goal twelve years of free, publicly funded, equitable quality primary and secondary education, of which at least nine years are compulsory, leading to relevant learning outcomes. While accepting that the first assignment for successfully bringing these ideals to fruition is directed at (UNESCO 2016d, cited in De Beer & Wolhuter 2020):

> [*G*]overnments, the declaration also asks for intense global and regional collaboration, co-operation, coordination, and monitoring of the realisation of the education agenda, based on data collection, processing and reporting at the country level, within the structures of regional entities, mechanisms and strategies. (p. 43)

Assessment parameters for a new era in comparative and international education

Foreign aid and international agencies have become important players in the global education project. Much can be said about the adverse side effects of foreign aid and international agencies, especially where the Global South is on the receiving end. What is needed in terms of a research agenda for comparative and international education is a level-headed analysis of the impact of foreign aid and international agencies on contexts in the Global South and how these can be harnessed to the benefit of the Global South. The paradigm which Roland Paulston (1977, p. 388) identified and named the paradigm of cultural revitalisation here comes to mind as a direction in which scholars can turn to find a cue, which can be further built on in the field. Cultural revitalisation offers an extension as well as a rebuttal and positive outlook to conflict paradigms such as that of socioeconomic production or dependency theories. Cultural revitalisation focuses on deliberate, organised efforts by communities to create more satisfactory cultures at both the national and local levels (Paulston 1977, p. 388). Examples of cultural revitalisation are

Joseph Elder's (1971) paper, 'The Decolonization of Educational Culture: The Case of India', and Rolland Paulston's (1972) paper, 'Cultural Revitalization and Educational Change in Cuba'.

On the work of international agencies, Northern hegemony certainly is visible in the operations of at least the World Bank and the OECD. While UNESCO and initiatives such as Education for All were crafted more with global participation, it should be remembered that Foucault (1972, p. 224) cautioned that any discourse seldom expresses truth or meaning but functions as a mechanism of control. In the case of the work of international agencies, balanced, thorough analyses are needed in Global South settings, as these are needed in the case of the operation of foreign aid, with the intention to determine how these forces in education supply can best be used to benefit the nations of the Global South. In this respect, once again, the paradigm of cultural revitalisation seems to be promising.

Conclusion

Foreign aid and international agencies are major actors in the global education scene. The involvement of foreign aid and international agencies in education certainly has its downsides, and these downsides disproportionally affect the Global South. This gives comparative and international education scholars the assignment to explicate the adverse effects of these actors on education in the Global South and, more so, how foreign aid and international agencies can be utilised to the benefit of the Global South. In this regard, the paradigm of cultural revitalisation seems attractive and potentially valuable. Foreign aid and international agencies reach the Global South on the back of globalisation and should be seen together with the phenomenon or force of globalisation. Chapter 4 will turn to globalisation.

Chapter 4

Anti-globalisation in comparative and international education

Abstract

This chapter focuses on the societal trend of globalisation and how this trend has been interpreted by the comparative and international education scholarly community. The response of scholars of comparative and international education to globalisation can be plotted along two axes. The first axis pertains to assessments of the strength of the force of globalisation as a shaping force of (national) education systems. The second axis is a value judgement as to globalisation. Regarding the first axis, comparativists can be placed on a spectrum as to where they place the locus of shaping forces of education systems, from the global to the national to the local. On the second axis, while three positions can be distinguished – namely, pro-globalisation, other-globalisation and anti-globalisation – it is the anti-globalisation position that dominates the field. A central part of the anti-globalisation camp's criticism is that globalisation (at least in its present form) strengthens Northern hegemony. This chapter concludes that globalisation is a fact, and scholars in the field cannot and should not attempt to reverse the gear of history. Scholars of comparative and international education should reveal the ways in which globalisation reinforces Northern hegemony; at the same time,

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they should search for ways in which the force of globalisation can also be utilised to the benefit of the Global South. This chapter singles out current trends of degloblalisation and the accelerated internationalisation of higher education as two topics requiring special attention and offering special opportunities to scholars in the field.

Introduction

In the scholarly discourse right along the entire line of social sciences (and even beyond, in humanities, natural sciences, engineering and health sciences), there must surely be few buzzwords that made such a forceful entry in the past 30 years as that of 'globalisation' (only to have subsided somewhat, but noticeably so in the past few years). The term has undergone the same trajectory in education and comparative and international education. The objective of this chapter is to reconstruct the rise (and fall from its zenith) of the phenomenon of and the scholarly fixation with globalisation in comparative and international education, its overly negative judgement of globalisation (despite the new vistas which it opened for the field and its scholars) and how the denunciation of globalisation fits into the macro construct of criticism against Northern hegemony.

This chapter begins with a conceptual explanation of the term 'globalisation' and reconstructs its rise and the societal drivers of globalisation. In the next sections, the reception of the phenomenon and the term by the comparative and international education scholarly community is surveyed. It being part of the criticism against Northern hegemony is then outlined and interrogated. On the basis of that interrogation, in the conclusion part recommendations are made as to how students in the field of comparative and international education should respond to the tide of globalisation, in such a way that the cause of the affirmation of the Global South (the theme of this book) is best served.

Globalisation: Conceptual clarification and its rise and assessment

Conceptual clarification

There is no universal definition of 'globalisation'. A much-quoted definition, and one which will also be used in this chapter as a working definition, is the description of Held (1991), namely that:

> [*G*]lobalisation refers to the intensification of worldwide social relations, which link distant localities in such a way that local happenings are shaped by events occurring many miles away and *vice versa*. (p. 9)

This is also the way Edwards (2021) clarifies the term, namely that it refers to the worldwide intensification of social interaction. It refers, therefore, to the worldwide integration of people, societies and economies. Drawing on the publications of sociologists Martin Albrow and Elizabeth King, Di Nicola (2020, n.p.) explains that globalisation has also been described as the whole world being 'incorporated into a single society'.

An indication of the intensification of worldwide relations affected by the force of globalisation is the research done by Facebook on Facebook users. There is a longstanding theory, first put forward in 1929 by Hungarian author Frigyes Karinthy, that every person on Earth is six links away from anyone else. This means, on average, any two persons (say Person A and Person B) taken anywhere on Earth are six links away. That means Person A will know someone (Person 1) who knows a Person 2, who will know a Person 3, who will know a Person 4, who will know a Person 5, who will know a Person 6, who will know Person B. 'Know' is defined as two persons walking past each other on street, both will recognise each other's faces and each one will know the other's name. Research by Facebook has concluded that the 1.59 billion users of Facebook are, on average, a mere 3.57 links separated from each other (Murphy 2016).

A common conceptualisation of globalisation is that of Pieterse (1995, p. 45), who writes of globalisation in terms of 'the ideas that the world is becoming more uniform and standardised, through technological, commercial and cultural synchronisation emanating from the West, and that globalisation is tied up with modernity'. Parker (1997) describes globalisation as:

> [*A*] growing sense that events occurring throughout the world are converging rapidly to shape a single, integrated world where economic, social, cultural, technological, business and other influences cross traditional borders and boundaries such as nations, national cultures, time, space, and industries with increasing ease. (p. 484)

Mooney and Evans (2007) highlight a growing sense of global interdependence and a growing international consciousness as the essential features of globalisation. As will become clear later in this chapter, none of the above conceptualisations of the term eclipses the entirety of the phenomenon of globalisation, and each has attracted criticism.

Societal drivers of globalisation

A number of interrelated societal drivers lie behind the trend of globalisation. These include the information and communication technology (ICT) revolution, increasing population mobility, the demise of the power of the nation-state, the neoliberal economic revolution and the ecological and other crises globally. The ICT revolution has set in place immediate 24-h planetary information and communication, thanks to the omnipresent personal computer, the Internet, the fax machine, the mobile telephone, Facebook and Twitter, among others. More than 200 billion emails are sent out across the world daily (Dijkstra 2017, p. 620).

This ICT revolution has also made the global population more mobile. The number of international migrants is increasing (Dijkstra 2017). The countries in the world have immigrants making up differing percentages of their population, reaching 88.4% in the case of the United Arab Emirates. The country with the most immigrants is the USA, with 49.8 million. The two countries with the strongest outflow of emigrants are India and Mexico, respectively, at 17 million and 11 million per annum. Short-term mobility has increased impressively. Whereas, in the USA, people travelled on average 50 metres per day in 1800, by the mid-2000s the figure stood at 50 km per day (Urry 2007).

The advent of the towering presence and power base of the nation-state and the neoliberal economic revolution (see ch. 3) have also given impetus to globalisation. Economic internationalism has already been salient with the setting up of the Bretton Woods Institutions – the World Bank and the IMF – after the Second World War and has been given further momentum by the neoliberal economic revolution, which does not respect national borders. It has taken advantage of the dwindling power of national governments. The rise of multinational companies and the free flow of investment and capital in a 24-h financial system, facilitated by electronic communication, come to mind as examples here.

In the present age, humanity is facing a set of crises or challenges beyond the power of a single nation or nation-state to address (see Ord 2020). The foremost of these is certainly the ecological crisis. The main dimensions of the ecological crisis, or the destruction of the human natural habitat on Earth, are air pollution (of which global warming is one, but by no means the only component), ground pollution and depletion of freshwater resources, marine pollution, deforestation, soil depletion and the destruction of biodiversity. The combined force of all these is the destruction of the natural habitat of humanity at a pace and to the extent that the future of the human species, and even of the planet, is in peril (see Mortimer 2014). The ecological crisis has precipitated a global attempt to prevent ecological disaster. This global attempt is visible in the 1992 Rio Declaration on Environment and Development (UN 1992) and the 1997 Kyoto Protocol (UN 1997).

Palaeontologists Richard Leakey and Keith Lewin (1996), in their book *The Sixth Extinction: Patterns of Life and the Future of Humankind*, explain that there have been five mass extinctions of life on Earth, the last being

65 million years ago and being caused by a meteorite. There is currently a sixth mass extinction of biodiversity taking place, this time caused by human action. In Chapter 3, the extent of the population explosion in the current era of human history was described. In his book, *The Future of Life*, Harvard University socio-biologist Edward O Wilson (2022) estimates that the 1.4 billion hectares of arable land on Earth can carry 10 billion people, but only if all resort to a vegetarian diet. According to Wilson (2022), the earth can carry only 2.5 billion omnivorous. If the American middle-class diet is extrapolated to a global population, the planet can carry only 2 billion people (Dovers & Butler 2022). A good index of the intensity of this process of ecological destruction is the Earth Overshoot Day. Each year, Global Footprint Network calculates the 'Earth Overshoot Day', that is, the date of a particular year in which humanity has taken from the earth what can be replenished by natural processes in one year. In 2022, that date was 28 July – its earliest ever since calculation commenced (Global Footprint Network 2022a). That means, according to Global Footprint Network (2022a), humanity is currently consuming nature 1.75 times faster than our planet's ecosystems can replenish, or humanity is consuming 1.75 times what nature can refill in a year. This day has steadily been edging forward. When Global Footprint Network first calculated the Earth Overshoot Day in 1970, it stood at 30 December (Global Footprint Network 2022b). In 2000, it reached 22 September, from where it moved forward to the current 28 July (Global Footprint Network 2022b).

While the ecological crisis is the most salient global challenge, it is by no means the only one. Other threats or challenges that require a global tackle include the threat of global terror, bioterror, the immanent possibility (if not probability) of artificial intelligence and cyber-crime. In fact, the entire range of likely or possible applied physics in the future, as outlined by Kaku (2009), such as teleportation, robots and time travel, requires a global response. In an age of mobile populations, a global pandemic (of which the recent coronavirus disease 2019 [COVID-19] pandemic is a graphic illustration, see Walker 2021) also requires a global, synchronised response.

It is all these trends that have brought about globalisation and that have induced a global take on societal issues in contemporary times.

Historical perspective: Friedman's three globalisations

Thomas L Friedman (2005) distinguished between the following three phases in the historical development of globalisation: Globalisation 1.0 (1492–1800), Globalisation 2.0 (1800–2000) and Globalisation 3.0 (2000–present).

The first phase, or Globalisation 1.0, commenced with the early voyages of exploration and colonisation, such as the Portuguese voyages of discovery around Africa and to the Orient at the behest of Prince Henry the Navigator in the 15th century. This was later followed up by similar voyages by the Portuguese and Spanish, notable events being Christopher Columbus' voyage of 1492, Bartholomeu Dias' 1488 voyage reaching the southernmost point of Africa, Vasco da Gama reaching India in 1498 and Ferdinand Magellan becoming, in 1519, the first person to circumnavigate the earth. England (particularly under the rule of Queen Elizabeth I) and the Netherlands (especially after the creation of an independent nation-state in 1648) joined Portugal and Spain in the next two centuries (the 16th and 17th centuries). National chartered companies (e.g. the Dutch East India Company) played an important part in this colonisation project, but it was still a case of globalisation pursued by national governments.

One important part of Globalisation 1.0 not mentioned by Friedman and often omitted when surveying and reflecting on Globalisation 1.0 is that of the trans-Atlantic slave trade. In 1660, the Royal African Company was founded. Between 1451 and 1870, over 9 million people in Africa were forcibly shipped to the Americas and enslaved (the best estimate, the research of the late professor Philip D Curtin, puts the exact number at 9,566,100) (Curtin 1969). The Royal African Company was instrumental in a large part of this exercise. The Royal African Company was in many respects similar to other companies such as the Dutch East India Company, the Dutch West India Company or the British East India Company, specifically regarding giving rights regarding trade in agricultural products and minerals, but went further in that it also included buying, selling and trading in slaves (Frankopan 2023, p. 361). This had a forceful impact on the histories of the new world (also, not only on the negative depiction of the Western-directed globalisation right until the present day but also the course of the history of education in the world, e.g. in terms of being one of the societal antecedents of multicultural and intercultural education, of the drive for equality or equity in education, of the desegregation of schools movement and of the civil rights movement in education). By 1680 (20 years after the founding of the Royal African Company), the trade of enslaved people made up around half of Europe's trade with Africa, and a century later, in 1780 – at the peak time of the trans-Atlantic slave trade it reached about 90% (Frankopan 2023, p. 361). Ship owners in Britain used this opportunity to build bigger, better and faster ships. In the relatively short space of 100 years from 1750, the tonnage transported by British ships increased sevenfold.

The impact of these improved merchant navies on global trade is impressive. The case of trade in sugar can be taken as an example. In the 100 years from 1700 to 1800, the import of sugar into Britain rose fifteenfold, from 10,000 metric tons per year to 150,000 metric tons per year (Frankopan 2022, p. 374). Sugar was but one commodity of many in which a rife global trade developed. Others included tea, coffee and timber. Tea, coffee and sugar became indispensable parts of Western meals.

What is also important to note, from the point of view of the topic of this book, is the comments from contemporary scholars of the lobbies of, among others, social justice and decolonisation, the lopsided relations of this time, favouring the Global North and disadvantaging the Global South, a disadvantage that continues to this day (Frankopan 2023, p. 174; Piketty 2021, pp. 203–207, 228–229).

While American independence (1776), the French Revolution (1789) and the devastation of the Napoleonic Wars (till 1821) brought Globalisation 1.0 to an end and a weakened Europe saw the colonies of Latin America becoming independent in the 19th century, almost immediately a new Globalisation 2.0 commenced. This second phase of globalisation was a time of intensive globalisation made possible by new technology related to transportation systems (the steamboat and the railways) and communication (invention of the telegraph and the telephone) and took place from about the middle of the 19th century. George Stephenson began the first commercial train service between Stockton and Darlington in 1829, followed soon after, in 1830, by the Liverpool–Manchester line. It did not take long for steam power to go to water. Robert Fulton patented the first steamboat in 1807. The first European steam warship was the *PS Rising Star* (1817–1818). In 1812, the *PS Comet*, built in Glasgow and operating on the Clyde, became the first commercial steamship in Europe. Soon, the steamer took to intercontinental sea travel. In 1825, the *Enterprise* became the first steamer to reach Calcutta. In 1838, two British steamships, *SS Great Western* and *SS Sirius*, made it to New York (although the American ship *SS Savannah*, partly driven by steam but mainly by sails, did cross the Atlantic in 1819). Once trans-atlantic passenger packets were in place, the price of travel between Europe and North America dropped, and this affected the strength of the immigration stream into North America. Between 1816 and 1830, the fare between Europe and New York was halved (Johnson 1991, p. 201).

This phase also saw a new spurt of exploration into the interior of Africa and a new colonisation – that of sub-Saharan Africa during the last quarter of the 19th century. Global economic integration appeared as investment capital flowed all over the world – much of it originated in London and was connected to the economic development of colonies and former colonies, including the USA, Canada and Australia. Globalisation 2.0 is also visible in organisations with a global reach coming into being during this time, such as the International Red Cross (founded 1863), the Nobel Prize (instituted in 1901), the International Scouting Movement (established in 1908), the

Universal Postal Union (established in 1874) and the Modern Olympics Movement (which dates from 1896).

In considering Globalisation 2.0, mention should also be made of – and this is also lamentably usually ignored in discussions of Globalisation 2.0 – the anti-abolitionist movement and the role of Great Britain in enforcing the cessation of the slave trade. In this role in Globalisation 2.0, Johnson described Great Britain as becoming the world's policeman (Johnson 1991, p. 286).

The outbreak of the First World War had brought an abrupt halt to this spurt of globalisation. Similarly, the fierce nationalism rife in many of the leading powers of the world, the Great Depression and its aftermath during the inter-War decades and, finally, the Second World War made for a hiatus in the force of globalisation.

The post-Second World War decades saw a resumption of the relentless force of globalisation. The Bretton Woods Institutions (IMF and World Bank), and later the World Trade Organization (WTO) (founded in 1995 to promote and facilitate international trade) created a framework for a globalised economic order and the UN (founded in 1945) created a framework for a globalised political order, while the internationalisation of the Creed of Human Rights put in place a moral constitution for a globalised world. This code was buttressed by the work of organisations such as Transparency International, Greenpeace, Human Rights Watch and Amnesty International. This force of globalisation travelled on the wings of technology such as aeroplanes, television and satellite communications. Non-governmental organisations (NGOs) appeared and made national borders seem more porous.

Around the year 2000, the world entered into a new era of Globalisation 3.0. The driving force in Globalisation 3.0 is the newly emerged capacity of individuals to collaborate and to compete, which is globally made possible by new technologies such as the personal computer, the smartphone, software and the Internet. Important for the thesis of this book is that Globalisation 3.0 is more egalitarian, not only in the sense that it contributes to the breaking down of the hold of the state and gives power in the hands of civil society but also in the sense that power is attainable to large numbers of people outside the affluent echelons of people in the Global North. Thus, one way to summarise this timeline is that Globalisation 1.0 is related to countries, Globalisation 2.0 is related to companies and Globalisation 3.0 is a type of globalisation in which technology is accessible worldwide.

In perhaps too much of a positive and sanitised view of Globalisation 3.0, Gray (2022) put it that previous waves of globalisation were characterised by huge power imbalances. The first wave of globalisation was the era of empires and colonialism. In this phase, the world was the scene of conquerors and colonists transversing borders and time zones by land and sea. The Persian, Greek, Roman, Mongolian, Portuguese, Spanish, Dutch, French, Japanese and British Empires, as a few examples, took over large parts of the world and profited from labour and natural resources in their new colonies. It was exploitative (Vladimir Lenin [1916], in his book *Imperialism: The Highest State of Capitalism*, portrays imperialism as the zenith of capitalism) and relied entirely on physical movement and conquest. As mentioned, this optimistic view of Globalisation 3.0 as the great equaliser and tool of empowerment in the world is also evident in other studies, such as Thomas Friedman (2005) and Richard Dowden (2009). Friedman (2005) portrays an unfolding 'flat world' created by Globalisation 3.0, that is, where whatever benefits geography (location, natural resources) has bestowed on a country are being wiped out by technological development, which has provided an equal playing field where the quality of human resources (education, creativity, productivity) will be the main determinant of national power. Dowden (2009) alleges that the mobile phone will prove to be the instrument that will catapult Africa to become a potent (economic and other) force on the global map.

While there is probably more than a kernel of truth in this optimistic portrayal of Globalisation 3.0, the undeniable truth of the existence of the digital divide (with its debilitating effect for societies and people on the side without digital technology) and the potential of technology to serve as instrument of surveillance and suppression by the principals of the economy and governments alike have been illustrated recently by two top-selling books by Shoshana Zuboff (*The Age of Surveillance Capitalism: The Fight for a Human Future at the New Frontier of Power*, 2018, in the case of the principals of the economy) and Jonathan Hillman (*The Digital Silk Road: China's Quest to Wire the World and Win the Future,* 2021, for a more nuanced and balanced assessment of the role of Globalisation 3.0). These points should also be taken into account when pondering the affirmation of the Global South in education and in comparative and international education.

The reception of Globalisation 3.0 by the comparative and international education scholarly community

From around the turn of the millennium, the buzzword of 'Globalisation' caught up with the field of comparative and international education. Leading journals in the field devoted special issues to globalisation and (comparative and international) education, such as the *Comparative Education Review*.[5] Globalisation figured again as the theme of a *Comparative Education Review* Special Issue in November 2021, when volume 66, issue 4 was a special issue on *Globalisation, Teaching and Teacher Education*. A new journal, *Globalisation, Societies and Education*, commenced in 2003, with comparativists being prominent in the list of article authors and editors, including the two founding editors Susan L Robertson (University of Cambridge) and Roger Dale (University of Auckland, New Zealand, and University of Bristol, UK). Globalisation became the theme of comparative and international education societies' conferences. In 1997, the journal *Journal Studies in International Education* made its debut. Although the focus of this journal is the internationalisation of higher education, this is a topic of interest among scholars of comparative and international education (the name of Philip Altbach comes immediately to mind in this regard), and indeed, many of the contributions in this journals have come from the pens of comparativists. It was also within the context of the force of the trend of globalisation that the call to change the name of the field from comparative education to comparative and international education, as explained in Chapter 1, has become stronger. International education is then used here with the meaning given to the term by Phillips and Schweisfurth (2014, p. 60) as a scholarship studying education from a global or an international perspective.[6] It was also at this time, under the force of globalisation, that, in keeping with the trend of the phasing out of many stand-alone comparative education courses but subsuming comparative education in other courses, courses such as 'globalisation and education' appeared at many universities (for a more detailed discussion on this, see ch. 1).

World Council of Comparative Education Societies' secretary general and later president Mark Bray (University of Hong Kong) published an article in which he repositioned the field, its mission and roles within the rising phenomenon of globalisation (Bray 2003). Similarly, Stanford comparativist Martin Carnoy (2019), in his reconstruction of the history of the field at Stanford, entitled the decade of the 1990s as 'Comparative

5. In volume 46, issue 01, February 2002 Special Edition on 'The Meanings of Globalisation for Educational Change', edited by a leading scholar in the field, Stanford comparativist Martin Carnoy, together with Social Science Research Council New York Director Diana Rhoten.

6. It should be mentioned that the term 'international education' has a long and very contentious history in the evolution of the field of comparative education. During this history, it has taken on different meanings, the meaning of Phillips and Schweisfurth, taken in this chapter and book (and which is also the meaning implied by those advocating the changing of the name of the field from comparative education to comparative and international education), is a recent definition. The historical development of the term and the polemic it has caused in the field of comparative and international education are beyond the scope of this book, but in this regard, the interested reader is referred to the 1994 CIES Presidential Address of David Wilson on this topic (Wilson 1994).

Education and the Impact of Globalization'. The theme of the presidential addresses of two professional societies in the field at this time dealt with globalisation (and education and comparative and international education). These were the CIES presidential address by Noel McGinn (1996) and the 2000 British Association of International and Comparative Education (BAICE) Presidential Address by Peter Jarvis (1990).

The response of scholars of comparative and international education to globalisation can be plotted along two axes. The first axis pertains to the strength of the force of globalisation as the shaping force of education systems. The second axis is a value judgement as to globalisation.

Axis: Locus of control of contextual forces shaping (national) education systems

Beginning with the first, comparativists can be placed on a spectrum as to where they place the locus of shaping forces of education systems, from the global to the national to the local. There are those who contend that national governments and societies, under the force of the trend of globalisation, cede all agency in shaping their national education systems to global forces, trends and institutions. An example of this is the protagonists of the paradigms of neo-institutionalism and world culture theory (see Wiseman 2021) – one of the 27 theoretical frameworks that the edited volume of Jules et al. (eds. 2021), mentioned in Chapter 1, identifies as a major theoretical framework extant in the field. Neo-institutionalism and world culture theory (a bastion of which is a group of comparativists based at Stanford University, including John Meyer, FO Ramirez, John Boli and others) contend that the entire global education expansion and reform project has been lodged by global, world culture forces and that a global isomorphism is taking shape in matters of education (e.g. see Dobbins & Martens 2012; Engel 2015; Sellar & Lingard 2013). This contention also holds for the Global South: the spectacular education expansion and reform that has taken place in these quarters in recent decades, according to the protagonists of world culture theory, is neither the outcome of national contextual imperatives nor does it serve the interests or needs of these societies, but is the outcome of global forces or fashionable trends. A classic example of this is Meyer, Boli and Ramirez' (1985) article in the *Comparative Education Review: Explaining the Origins and Expansion of Mass Education*. In this camp of comparativists, lending force to the global can also be placed on those who contend that education has built a new global culture (e.g. Baker 2014a, 2014b).

On the contrary, there are comparativists who steadfastly persist with the national education system as the level of analysis and portray the national context as the be-all and end-all of contextual shaping forces of (national) education systems (e.g. Tröhler 2023). Top scholar Martin Carnoy's (2019, p. 21) defence of the persistent salience of the national government in drawing up education policies has been noted in Chapter 1. At a theoretical level, Humboldt University, Germany, comparativist Jürgen Schriewer has argued the persistent presence of (national) contextual factors in shaping education systems in a series of books where this thesis appears graphically in the titles, the latest being *World Culture Re-Contextualised: Meaning Constellations and Path-Dependencies in Comparative and International Education Research* (Schriewer 2018). Examples in journals of case studies that confirm Carnoy's scheme abound. An example is Wangbei Ye's (2022) article on moral education in schools in China. At the extreme end of this spectrum, there are two interesting positions. Firstly, there are scholars who refuse to let go of the position of the 'local' as being unaffected by the impact of globalisation in shaping education systems (Wolhuter 2019, p. 22). As an example, the publication of Takayama (2010) can be cited (Wolhuter 2019, p. 22). Secondly, another extreme position on the local pole is the interesting position favouring the local as shaping agency, put forward by Sobe and Kowalczyk (2012). Drawing on the ideas of Brain Latour (2004), Saskia Sassen (2013) and Assemblage Theory, Sobe and Kowalczyk (2012, pp. 58–59) put forward the idea that what is 'global' actually is the outcome of (a tapestry of) things local in origin.

Then, between the positions favouring the global or the local in shaping education systems, there are scholars in comparative and international education (as well as in related fields of social science scholarship) who have devised schemes according to the agency of both global and local forces in shaping education systems. In one of the four most common textbooks used to teach comparative and international education at universities, the metaphor of the 'dialectic between the local the local' appears in the sub-title of Arnove et al. (eds. 2013) *Comparative Education: The Dialectics of the Global and the Local*, suggesting an interplay between the global and the local in shaping (national) education systems. It should be added here that, disappointingly, the metaphor of the dialectic is not unpacked or illustrated in the many chapters of this collected volume (a much-read volume that eventually became the most commonly used textbook in comparative education programmes and modules all over the world). Some scholars have put forward the notion of 'glocal' to name a dialectical dynamic between global and local societal forces shaping education systems (Niemczyk 2019). In a yet finer calibration than 'glocal', Simon Marginson (professor of higher education at the University of Oxford, Director of the ESRC/RE Centre for Global Higher Education [CGHE]) and G Rhoades brought in the national as a level between the global and the local in their concept of 'glocal' (Marginson & Rhoades 2002).

Teasing out the relative weight of the global, the national and the local as a shaping force of education systems is a topic that continues to intrigue scholars in the field. In a recently published article entitled 'The Discursive Utility of the Global, Local, and National: Teach For All in Africa', Levebvre, Pradhan and Thomas (2022) reported on how comparative and international education scholars have depicted shaping forces at each of these levels with respect to the Education for All movement in Africa.

Value judgement on globalisation

University of Ghent (Belgium) Belgian comparative and international education scholar Roger Standaerdt (2008) distinguished between three value stances on globalisation detectable among scholars in the field: anti-globalisation, pro-globalisation and other-globalisation. Scholars of the first category cast a condemning verdict on globalisation (and its impact on education), scholars of the second category portray globalisation to be a positive force and scholars of the third category view globalisation as having in itself latent benefits, but they ask for another kind of globalisation than the kind that currently manifests itself in the world. In comparative education literature, the anti-globalisation camp seems to be overwhelmingly dominant (cf. Wolhuter 2008, pp. 334–335).

Publications in which comparativists explicitly laud the advantages of globalisation are extremely rare. Scholars (not necessarily comparativists by profession) writing on the current global higher education revolution often portray the current developments in higher education under the impact of globalisation as salutary developments.

On the contrary, there is a strong body of publications in comparative and international education that are critical of globalisation, or at least the kind of globalisation playing out itself in the world of today. Negative sentiments revolve around the portrayal of globalisation as a force against social justice; a tool in the hands of hegemonic forces, eroding the autonomy of civil society. These include (but are not limited to) Northern hegemony over the Global South and the erosion of the sovereignty of governments in the Global South. Two examples of this negative depiction of globalisation are the CIES Presidential Address of 1996 and the 2000 BAICE Presidential Address by Peter Jarvis (1990). The strong negative sentiments about globalisation expressed by scholars and others, out of considerations of social justice, democracy, authentic education and others, include much more than Northern–Southern inequality, but the latter constitute a considerable part and motivation of such criticism. In the most recent (2022) CIES presidential address entitled, 'Recognizing Complexity in Our

Changing Contexts: Centering What Matters in Comparative and International Education', Karen Monkman (2022) argues that this globalised world asks for a new conceptualisation of the 'context' as key concept or threshold concept of comparative and international education (see ch. 1). She argues further that in this globalised world with its connections spanning all corners of real-time, communication has been made possible, though only for those possessing particular technologies. Being so, the ideas that circulate through the world are often dictated by those in power and accessed only by those possessing whatever technology is needed. Thus, only the privileged are taking part in discourses shaping ideas and knowledge, but these ideas and knowledge have a powerful impact on the lives of all, including the lives and working conditions of teachers and students.

As an example of how policies developed in Northern contexts gain global currency under the compelling force of globalisation and are then forced on nations of the Global South, where such policies are out of sync with the contextual ecologies of the Global South, Rizvi and Khamis (2020) explain how foreign aid agencies enforce long-cycle (four years) university teacher education programmes onto Pakistan, where it makes little sense given the contextual ecology of education and, in particular, teacher education in Pakistan.

One of the effects of globalisation has been to give new impetus to the internationalisation of universities. In fact, one of the hallmarks of the current age in world history is the global higher education revolution (cf. Altbach, Reisberg & Rumbley 2009), and one of the defining features of this global higher education revolution, in turn, is accelerated internationalisation (see Khamyab & Raby 2023; Wolhuter & Jacobs 2021, p. 299). As was explained earlier, there are many publications by comparativists and scholars in cognate fields of scholarship expressing positive sentiments as to the forces of globalisation facilitating enhanced internationalisation of higher education. However, progressive scholars have always tabled the questions 'what internationalisation, whose internationalisation, and what for?' and interpreted current patterns of internationalisation as working to the advantage of the Global North and serving to strengthen Northern hegemony (e.g. see Wan & Geo-JaJa 2013). In recent years, a body of critical scholarship on internationalisation has appeared, the leading scholar being Canadian scholar Sharon Stein (see Stein 2019). In a recently published case study of internationalisation of South African higher education institutions, it was remarked that two of the unintended consequences of internationalisation of South African universities have been, firstly, the one-way direction of international student mobility (see Wolhuter 2023):

- An influx of students from neighbouring Southern African countries (a sign of a second-order Global hegemony), resulting in a regionalisation rather than a globalisation of the student body
- An outflow of the best South African student talent to the Global North, resulting eventually in a brain drain.

Interestingly, within the Global North as focus, there has also surfaced literature critical of the kind of internationalisation taking place there, depicting internationalisation as an instrument to promote national interests and even as interpreting such policies as externalisation (see ch. 1) to legitimise domestic education policies, for example, Alexiadou and Rönnberg's (2022) publication of internationalisation policies followed in the higher education sector in Sweden.

Parameters of anti-globalisation as strand in criticism against Northern hegemony in comparative and international education

Globalisation (despite the notes later in this essay about impulses of deglobalisation detectable in the world of today) is a phenomenon brought about by a substratum of technological developments and as such seems to be a trend and a feature to stay. Scholars of comparative and international education (or whoever else) are not and will never be able to reverse the gear of history. Having said that, in as far as globalisation constitutes an instrument of Northern (or any other kind of) hegemony, this should be explicated by comparativists as much as scholars should (in remaining true to the philanthropic ideal as the highest objective of the field, as explained in ch. 1) present a vision of an alternative kind of globalisation. Furthermore, following the example of protagonists of the cultural revitalisation paradigm (as explained in the previous chapters), scholars should explore, guide and publish the use of the force of globalisation in Southern contexts for the affirmation of the Global South.

Two final notes are apt, the first on the concern-raising signs of deglobalisation and the second on the acceleration of the internationalisation of higher education. Firstly, there are ominous signs of deglobalisation in the world of today (see Richardson 2022). Brexit, populist governments recently in both the USA and the UK, the War in Ukraine, the outcomes of general elections in places such as Hungary and Sweden and events in Afghanistan are all signs, if not of populism, then definitely of protectionism and, therefore, of rising deglobalisation. 'Populism' is a notion defying a simple definition, but political scientists Benjamin Moffit and Simon Tormey defined populism not as an ideology (i.e. tied around principles) but rather as a style of politics used to create relations (Zulu 2022, p. 21). A pivotal feature of populism is its ‘appeal to the people’ (Zulu 2022). Populists view society as antagonistically divided between ‘the people’ and an ‘other’ (Zulu 2022). The ‘other’ is perceived to be responsible for the decay and debilitation of society or the exploitation and deception of ‘the people’ (Zulu 2022). What populism then means depends on and varies from one context to the next (Zulu 2022; see also Piketty 2020, pp. 39, 962–965), but it is unmistakenly on the rise in the contemporary world (see Biti et al. 2022).

Closely tied to populism is the declining fortune of democracy in the world. This author believes that the Creed of Human Rights (as was explained in ch. 1, the moral-philosophical framework from which this book has been written) is contingent on a dispensation of democracy (in fact, democracy is a human right). The *2020 Global Satisfaction with Democracy Report* by the Bennett Institute for the Future of Democracy, University of Cambridge (2020) notes that 2005 represents the beginning of a ‘global democratic recession’. In the mid-1990s, global satisfaction with democracy was about 57.5%, but a decade later, it dropped to 47.9% (Bennett Institute for the Future of Democracy, University of Cambridge 2020). The COVID-19 pandemic has given governments worldwide a pretext to further erode the rights of citizens, the autonomy of civil society and human rights (Omar 2021, p. 7). All these trends or developments either run counter to the ideals pursued by comparative and international education (as explained in ch. 1, with the philanthropic ideal being the capstone) or are difficult to reconcile or to put in one camp with the objectives of comparative and international education.

An interesting interpretation of the signs of growing deglobalisation in the world is the thesis unpacked in a recently published book edited by Daniel Tröhler, Nelli Piattoeva and William Pinar (2022b). This is namely that globalisation has finally been undermined by a global trend of inward-turning nationalism all over the world. The editors and contributing authors of this collected volume all cast a very negative, even alarming verdict on this trend and its obvious implications for education.

When criticising globalisation, students of comparative and international education should be cautious so as not to begin to sing in the choir of this pernicious deglobalisation lobby. On the contrary, the trend of deglobalisation and its discontents, as these impact education, should be explicated by students of comparative and international education. Similarly, how the pernicious aspects of deglobalisation can be countered by education should be demonstrated by comparativists.

Secondly, as was explained earlier, it is on the back of globalisation that one of the trends in higher education, namely, enhanced internationalisation, has been rising in recent times. It was mentioned earlier that the internationalisation of higher education has gained a top slot on the comparative and international education research agenda, with scholars such as Philip Altbach (once CIES president) and University of Sydney comparativist Anthony Welch and former President of the Australian and New Zealand CIES Peter Ninnes publishing prolifically on the topic. Internationalisation of higher education not only falls in the scope of study of comparative and international education but is also a way of realising many of the goals of the field, such as promoting international and intercultural dialogue and solidarity and realising the philanthropic ideal (see ch. 1). However, as was noted a critical body of scholarship, with Sharon Stein as the leading scholar, has appeared pointing out the role of internationalisation of higher education in reinforcing Northern hegemony. In this regard, then, scholars in the field have an assignment to explicate the malcontents of current practices of internationalisation and how these could be rectified so as to ensure that the internationalisation of higher education is to the benefit of the Global South as well.

Conclusion

The compelling force of globalisation has hit the world and, in particular, education. There is certainly a case to make that in at least some instances, globalisation strengthens Northern hegemony in the world, in education and in comparative and international education. Such instances should be revealed by scholars in the field; moreover, attempts should be made to ensure that the force of globalisation is utilised for the benefit of the Global South. Scholars in the field of comparative and international education should be aware of the current groundswell of deglobalisation in the world, representing the antithesis of everything that comparative and international education stands for. Furthermore, the current accelerated internationalisation of universities is a trend scholars should capitalise on in furthering the objectives of the field. The twin sibling of globalisation is the neoliberal economic revolution. It is to this topic that the next chapter will turn to.

Chapter 5

Criticism against neoliberal economics and its impact on education

Abstract

Neoliberal economics is an intense force that has swept over the earth for the past 35 years. It has an impact on society that has reached far wider than merely the economy. The education sector, too, was not spared from the effect of this compelling force. Much criticism has been expressed against the neoliberal economic revolution and its effect on education. A substantial part of this criticism is its disproportionate adverse effect on education in the Global South. This chapter surveys the neoliberal economic revolution and assesses its impact on education in order to determine how a reconstructed field of comparative and international education, in which the Global South does come to its right, should look and position itself against the neoliberal economic revolution. The neoliberal economic revolution certainly has opened new vistas and new possibilities for education. At the same time, it has had a set of adverse effects on education. These revolve around issues of social justice and equality in education, the erosion of the professional status of teachers and of the autonomy of the university and of the academic profession, and of establishing a very narrow reductionist view of human beings and of education.

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Introduction

The economic facet of the process of globalisation described in Chapter 4 was been neoliberal economics. One of the most significant changes in the world over the past 30–40 years has been the neoliberal economic revolution. It has had a specific impact on the Global South, and a particular impact on education in the Global South, as well as a very visible reception by the comparative and international education scholarly community. The objective of this chapter is to survey the neoliberal economic revolution and its impact on education, especially its disproportionate impact on education in the Global South and how that has fed into the criticism against Northern hegemony in the field of comparative and international education and how that is obstructing the Global South to come to its right in education and in the field of comparative and international education, and what the stance and engagement of scholars in the field should be, in order to rectify this state of affairs in the field. The chapter begins with a definition of the term 'neoliberal economic revolution'. Then, the societal contextual antecedents and the course of the neoliberal economic revolution are surveyed. That is followed by a discussion of the criticism that neoliberal economics has attracted. The focus is then narrowed down to the impact that the neoliberal economic revolution has had on education and on education in the Global South in particular.

Conceptual clarification

The quintessential trait of the neoliberal economic revolution is a scaling down of the scope and share of the state in a national economy and allowing freedom to the forces of the free market (Wolhuter & Van der Walt 2019). The state curtails its services down to those that no other organisation can set in place, such as the handling of foreign affairs, maintaining rule of law and maintaining a national defence force, and retracts from services such as providing health care services or public transport services and from a controlling, prescribing and commanding role in economic affairs (Wolhuter & Van der Walt 2019, p. 3) in particular, but also with respect to other social or societal matters, notably – to return to the topic of this chapter and book – education. Closely associated with neoliberal economics are performance appraisal and performance management (or the whole cult of performativity), profitability and the profit motive, and efficiency.

Key economists who have been advocates of neoliberal economics include advocates of the human capital theory, such as Theodore Schultz (1961, 1981) and Gary Becker (1993; see also Rose 2003), and those economists in favour of extreme free market policies, such as Friedrich Hayek (1944, 1982) and Milton Friedman (1962; Friedman & Friedman 1980).

Societal antecedents and course

The neoliberal economic revolution has been a strong societal trend that commenced in the West, and from there, it diffused to the East and to the South. It should be remembered that (Wolhuter & Van der Walt 2019):

> [*O*]ne of the hallmarks of modern history is the construction of the nation-state. The timeline demarcating the beginning of the modern age has a high degree of stretchability; but in this chapter it is taken as beginning after the end of the Napoleonic era, that is, from the dawn of the nineteenth century. The central government of the nation-state became a powerful factor in society: it is a case of virtually all the power and authority becoming centralised at one point (Hartshorne 1989, p. 103). As illustration of this concentration at a single point of power in the nation-state is the following: by the mid-twentieth century, typically a quarter to half of national incomes was funnelled to the state by means of taxes, whilst in traditional (pre-modern) societies, the percentage did not exceed five per cent (Idenburg 1975, p. 71). (p. 1)

A number of technological developments in the 19th century facilitated this building of large nation-states, the concentration of power at one point and its quick deployment and enforcement over a large area, and binding together the people and administration of a large area and the collection of taxes and a large area. The cumulative effect of a set of technological inventions was to make national communication and national integration easier. These 19th-century technological innovations include the development of railways, which proceeded apace after George Stephenson used the steam engine (developed by James Watt in the second half of the 18th century to pump water out of coal mines) for a steam locomotive. Other 19th century innovations include the invention of the telegraph in the first half of the century and the telephone in the latter half. James Loudon McAdam (1756–1836) developed the technique of tarring roads in 1816, putting in place more roads that were more durable and less muddy, making them easier to negotiate than soil-based tracks. Charles Goodyear (1800–1860) patented the vulcanisation of rubber in 1844, which eventually resulted in the development of the pneumatic tyre. Other technological developments of the ensuing era, the first half of the 20th century, further contributed to the consolidation of the power of the centralised national governments. These include the development and mass production of automobiles, the aeroplane and the radio, and at the end of the first half of the 20th century, the television. The last two, radio and television, along with the development of national broadcasting stations facilitated the spread of state-sanctioned news and information, the legitimisation of the state and the moulding of national unity and loyalty towards the state. The invention of lithographic or chemical printing during the first half of the 19th century revolutionised mass printing (see Johnson 1991, pp. 588–589). Not the least important aspect of the state building its power base on the substratum of technological means was the institution of mass systems of public education. In this regard, the *Foster Act of 1870*, the *Mundell Act of 1880*, the *Balfour Act of 1902* (or *Elementary Education Act*) in England, the *Guizot Act of 1837*, or Horace Mann's establishing of the State Board of Education in Massachusetts in 1837 (the first in the USA) can be cited as examples. Another example is Napoleon's institution in 1808 of the *baccalauréat*, a uniform, public secondary school termination examination which up to today forms a pivotal part of the public education system in France. In the German-speaking part of Europe, Frederick the Great's (ruling 1740–1786) *General School Regulation of 1763* already made school attendance for all children of 5–14-years-old obligatory, while his successor, Frederick William II's 1794 *General Code* stipulated that all schools henceforth would be state institutions. In Japan, the Meiji Restoration of 1868 brought a constitutional revolution – power was snatched from the shoguns (feudal lords), and a central government, with power centralised in this central government, was instituted. This made possible the rapid development of the first Japanese national education system.

Thus, over a history of almost 200 years, the Western welfare state was built. During the middle decades of the 20th century, the privations of the Great Depression in the 1930s and then the devastation brought by the Second World War saw to it that this building of the Western welfare state was accelerated. Examples that come to mind here are the 'New Deal' of the USA by President Franklin D Roosevelt in the 1930s and the Beveridge Report in the UK just after the Second World War. The Beveridge Report paved the way for the establishment of a system of Public Health in the UK. In the early 1930s, President FD Roosevelt had in the USA the lingering effects of the crash of Wall Street (the stock exchange) in 1929 and its devastating, deepening socioeconomic consequences that had triggered a run on banks in late 1932. Nine million Americans lost their savings as half of the banks in the country closed down (Calland & Sithole 2022). Fifteen million Americans were unemployed. Confidence in the government, as in the economy, fell (Calland & Sithole 2022). That was the domestic situation when Roosevelt came to power in 1932. Roosevelt promulgated the *Social Security Bill* in 1935, providing some relief to the unemployed, the poor and the elderly. Further, heeding leading scholar John Maynard Keynes' (1936) remedy for a recession explained in his classic, *The General Theory of Employment, Interest and Money,* prescribing counter-cyclical policies, that is, that government should spend its way out of a recession, Roosevelt lunched his 'Big Deal' of massive state expenditure in building infrastructure such as the Hoover Dam.

In the UK, the devastation left by the Second World War created circumstances favourable for the Beveridge Report, officially entitled *Social Insurance and Allied Services Report* in 1942, which laid the basis for the creation of the British Social Security System (national pension system and national health insurance). Thus, by 1970, the Western welfare state had grown into a colossal structure.

However, three-quarters into the 20th century, it became clear that the Western welfare state was unsustainable, as the governments of these states became entrapped in popular entitlement programmes (such as systems of public transport and health care services) they could not pay for (see Redwood 1993, pp. 41–44). By the end of the 1970s to the beginning of the 1980s, it became evident that the Western welfare state overextended itself. The clearest evidence of this was in growing public budget deficits. For example, by 1990, the public budget deficit of the USA came to US$200bn (Davidson & Rees-Mogg 1992, p. 394). While the GDP was increasing at a rate of 8% per year, government debt grew at a pace of 11% per year (Davidson & Rees-Mogg 1992).

Moreover, the 1973 oil crisis, which saw oil prices quadruple within the space of one year and the phenomenon of 'stagflation' it brought with it, created a problem that Keynesian economics could not explain, much less address. Then, in 1979 and in the early 1980s, conservative governments took over in the USA (President Ronald Reagan), the UK (the Conservative Party under Prime Minister Margaret Thatcher), Germany (Chancellor Helmuth Kohl), Canada and elsewhere. They brought with them – or were forced by the financial and economic realities of the time to implement – neoclassical free market economic policies. This neoliberal economic revolution entailed the downscaling of the range of services of the state and giving the dictates of the free market freedom of reign. Governments withdrew, or at least ended a government monopoly on an assortment of services, such as health care services, transport, post and telecommunications, electricity and water supply and also education. Privatisation became fashionable.

It was not only out of financial and economic necessity that these reforms were effected. It was also done in the belief that massive, centralised, bureaucracy-swollen entities, far removed from the consumer, are not streamlined to respond fast and efficiently enough and as cheaply as possible to the needs of consumers, nor could such entities adapt fast enough to rapidly changing and advancing technology (see Redwood 1993, pp. 6–7, 44, 45; Watson 1996, p. 4). The absent factors in government monopolies are competition and individual (consumer) choice. The experience of the preceding decades of government monopolies that preceded the wave of neoliberal economic reform showed that if there were no competition, then there were no pressure to provide better services, to innovate, to provide better responses and to be more attentive and sensitive to consumer needs (see Redwood 1993, pp. 44–53). There is also the problem that bureaucracies become self-sustained monsters, serving their own interests and the interests of their members rather than serving the public, and that in so far as bureaucracies are accountable, they are accountable to their political masters and not to the public. In his classic book on the modernisation process in Latin America, Argentina in particular, *Bureaucratic Authoritarianism: Argentina 1966–1973*, Guillermo O'Donnell (1973) introduced the term 'bureaucratic authoritarianism'.

In the Eastern bloc, the economic predicament of governments by the end of the 1980s proved to be even worse than that of the Western states. At the height of the Cold War and the ideological race between West and East in the early 1960s, Soviet leader Nikolai Khrushchev, based on his projections of the economic (Wolhuter & Van der Walt 2019):

> [*G*]rowth rates of those years into the future, predicted confidently that by 1980, the USSR would surpass the gross national product of the United States of America (Kasrils 1993, p. 87). That was not to be. By 1989, the gross national product of the USSR was only US$1,424,372 million, whereas that of the United States of America was US$5,237,505 million (The Europe World Year Book 1991, p. 2896, 1992, p. 2760). Technological progress and the fiasco of the military operation of the USSR in Afghanistan in the early 1980s made it evident that the USSR was at the point of breaking down, and this emboldened civil society, not only in the USSR but throughout Eastern Europe, to assert its power and take political control. After the fall of the Berlin Wall on 09 November 1989, the neoliberal economic revolution also spilled unstoppably into Eastern Europe. (p. 2)

The economic woes of the developing countries too were, by the 1980s, far worse than that of the Western nations. These woes are evident in budget deficits and public debt levels. For example, Africa's total debt had swollen from US$ 14bn in 1973 to US$ 187bn in 1987 (Kennedy 1993, p. 214). By the time of the mid-1980s, repayments of debts took up approximately half of Africa's export earnings. A combination of rising foreign debts, poor governance, political instability, creating a policy environment or even being openly hostile to foreign investors and to the business sector, policy uncertainty, rampant population growth, the degradation of the environment and its adverse effect on agricultural production, the toxic combination of, on the one hand, overregulation (stifling the initiative of people and suppressing the autonomy of civil society; promoting an ineffectual but extractive, rent-seeking and corrupt bureaucracy) and, on the other hand, poor governance and a failed state (being unable to dispense the core functions of government, such as ensuring rule of law, securing life and property and establishing and maintaining infrastructure where the private sector and civic society are not strong enough to supply) added up ended in economic stagnation and decline (see Europa Publications 1996, p. 15; Meredith 2005, 2014).

The end of the Cold War in 1989 resulted in Africa and the other nations of the Global South no longer being able to play off the West and the East against each other to extract aid, loans and handouts in return for political support. It was within this context that the World Bank and the IMF assumed the role of a lender of the last defence, arranging the rescheduling of debts in return for structural adjustment or a package of economic reform measures. These Structural Adjustment Agreements signed by the IMF and governments thus entailed the adoption of a series of wide range of economic policies. These included a gross reduction of government expenditure and a contraction of the range of activities in which the state involved itself, privatisation of many of these erstwhile state functions or monopolies, instituting policies friendly to and encouraging the private sector, entrepreneurs and investors, currency devaluation and controlling money supply so as to contain inflation and to ensure monetary stability (see Campbell & Stein 1992, pp. 5–10; Europa Publications 1997, pp. 7–15). Currency devaluation was prescribed in order to redress the balance of payment problems: it made imports of countries more expensive while making their exports cheaper. Out of the conviction that the growth of the state sector has resulted in corruption, sheltered employment and rent-seeking, as well as being inefficient and wastful, the World Bank expected debtor countries to decrease the role and staffing of the state. By 1988, already more than 28 countries in Africa had signed such Structural Adjustment Programme agreements (Campbell & Stein 1992, p. 6). An example of the adverse effect that a Structural Adjustment Programme had on education is Malawi. In 1981, the economic predicament of Malawi was so bad that it was forced to sign a Structural Adjustment Agreement with the World Bank. Education as a percentage of the government's total running costs over the decade fell from around 14% in the mid-1970s to below 9% in the mid-1980s (Rose 2003, 72). At the outset of the 1990s, spending per primary school pupil was less than that at the beginning of the previous decade and was substantially less compared to the early 1970s (Rose 2003).

While this narrative concentrates on Africa, and Africa best exemplifies the points made, it can be repeated in many other parts of the Global South and in Latin America, Asia and the Middle East (see Harrison 1979). It should be mentioned that even governments in the Global North, having overextended themselves and needed to approach the World Bank and IMF for a bailout. A good example (to connect to what has been written earlier about the reforms brought by the Beveridge Report of 1942) is the UK. In 1976, the Labour Party government was forced to approach the IMF for a loan of nearly US$4bn. International Monetary Fund negotiators required substantial reductions in public spending, greatly affecting economic and social policy (UK National Archives 1976). Even if the

Conservative Party government did not commence with an even more sharp turn towards neoliberal economics when taking over government in 1979, it is doubtful whether a Labour Party government would have been able to carry on with the post-war social security net.

Impact on education

Cutting of public expenditure on education

As is clear from the earlier portrayal, one of the outcomes has been the downscaling of the involvement of the state in education. State expenditure on education was cut (e.g. see Rose 2003). Public spending on education in sub-Saharan Africa rose from US$3.8bn in 1970 to US$10bn in 1980, only to drop again to US$8.9bn in 1983 (World Bank 1988).

Amidst a stellar education expansion globally, total global expenditure on education (that is public as well as private expenditure) has risen during the ten years (2009–2019) in real terms at a rate of 2.6% per year, from US$3.8 trillion in 2009 to US$5.0tn in 2019 (in constant 2018 US$ terms) (World Bank Group 2021, p. 3). This rate of growth in education expenditure is lower than the rate of economic growth and much lower than the rate of education expansion (World Bank Group 2021). During this time, the share of private spending in the entire spending package has increased (World Bank Group 2021).

(Re-)Introduction of school fees

School fees were introduced in many places where there was free education, although, especially at primary school level, as the movement towards universal basic education (‘Education for All’) gained traction since 1990, there was once again a movement towards free primary education. A case in point is Malawi (see Rose 2003). Another example is Kenya. A decade after independence (1963), the government attempted to introduce free primary education in the 1970s. This attempt eventually failed inter alia as it met the counterforce of the ever-stronger neoliberal economic revolution. Then, in the wake of the Education for All movement, the government re-introduced free primary education in 2003 (see Mulinya & Orodho 2015). Following the report of the Dearing Commission in 1996, university fees were introduced in the UK in 1998. Fees were introduced on the basis of the argument of ‘cost sharing’, and as it is the student who will eventually reap the benefit of higher earnings because of superior education, it is fair to shift the cost of education to the student and their family.

Privatisation of education: Growth of the private education sector

The neoliberal economic revolution also resulted in the growth of private education institutions (see Mundy & Menashy 2014; Verger, Fontdevila & Zancajo 2016). In a country such as Tanzania, private schools were abolished and not permitted upon the attainment of independence in 1961, only to be re-permitted in the early 1990s. Private universities now make up one-third of all universities worldwide. In sub-Saharan Africa, private universities were virtually unknown till the late 1980s, but in the short space of 30 years, they have become more numerous than the number of public universities. Worldwide private education institutions now have 38% of all enrolments at pre-primary school level, 19% of all enrolments at primary school level, 27% of all enrolments at secondary school level and 33% of all enrolments at tertiary education level (UNESCO 2022). While hard statistics are lacking, it appears that it is both in absolute numbers of institutions and enrolments and as percentage of the entire national education project; it is especially in regions of the Global South where private education is booming. A recently published UNESCO report states that of all world regions, it is in South Asia where the private education sector is growing the fastest (UNESCO 2022). In India, 25% of all pre-primary school enrolments, 45% of all primary school enrolments, 51% of all secondary school enrolments and 57% of all higher education enrolments are in private education institutions (UNESCO 2022). In Iran, the corresponding figures are 98% at pre-primary school level, 18% at primary school level, 11% at secondary school level and 43% at higher education level (UNESCO 2022). More than 90% of recognised pre-service teacher education institutions in India are privately financed through student fees (UNESCO 2022). The first private university in India opened its doors in 1995. By the end of 2022, there were 430 private universities in India (University Grants Commission, India 2022). That is almost half of India's total of 993 universities (Roy & Brown 2022, p. 2).

School voucher systems

A voucher system was introduced in some parts of the world, such as Sweden and, the most oft-cited case, Chile. The system introduced in Chile is a negative voucher scheme in that the amount of the voucher given by the government to parents, which they could redeem when enrolling their children in a school, was inversely correlated with the level of income of the parents. This resulted in Chile eventually having the most privatised education system in the world (see Hernández & Carrasco 2022).

Decentralisation of education

As a corollary of the neoliberal economic revolution and its belief system against centralised control, the world has seen a spate of educational decentralisation policies. Mwinjuma et al. (2015) distinguish between political, administrative and financial objectives of decentralisation. Political objectives include chiming in or demonstrating a government's belief in democracy: taking school governance closer to the people. Administrative objectives are the belief that centralised governance is cumbersome, is complicated and requires an unnecessary big bureaucracy. This leads to the financial reason, namely that a decentralised system is cheaper to run. Further to this, there is the argument that, especially in an era of rapid technological development, large bureaucratic structures cannot adapt fast enough to rapidly advancing technology (see Redwood 1993, pp. 6–7, 44, 45; Watson 1996, p. 4).

Decentralisation of education indeed became a key reform trend in the decades since 1980. Two well-known cases of even more education decentralisation in the USA have been the Chicago School Reform Programme (see Walberg & Niemiec 1994) and the Kentucky Initiative (see Squelch 2000). Australia and New Zealand were also the scenes of attempts to decentralise education control in the 1980s (see Sturman 1989). In 1987, the Picot Commission in New Zealand recommended a system that was more efficient, promoted equity and fairness, and encouraged greater local decision-making (Williams, Robertson & Southworth 1997, p. 627). In 1989, the new *Education Act* came into operation and made provision for schools to take over their own governance.

In China, after Mao Zedong, the rigid totalitarian central governmental control over education began to be relaxed during the 1980s. Financing and management of schools and universities were decentralised, being moved gradually towards provincial and local government structures (Ryan 2019, p. 41). In 1979, the *Gaokao*, which is a high-stakes secondary school termination examination at the pinnacle of the education system of China, was decentralised from central government to the provinces (Ryan 2019, pp. 40–41). One unintended result of the disintegration of the national education system that resulted from the chaos of the cultural revolution in China, *c.* 1966–1976, was the increase in the number of *Minban* or community-run schools (Ryan 2019, p. 37). The pro-free market economic reforms in China since 1979 have also resulted in a massive expansion of the private school sector in China. The private sector now accounts for 20% of all education institutions in China (Ryan 2019, p. 142).

The strong centralist trends and even totalitarian forms of government which featured in many regions of the world during the early decades to three-quarters into the 20th century were mentioned earlier. An extreme example is that of the USSR, 1917–1991. In stark contrast with the education system in the USSR at this stage, when the smallest detail of policy and practice were prescribed by the highest ruling party and state organs, centrifugal forces got the upper hand in the post-1991 change in Russia and the Commonwealth of Independent States (Balzer 1991, p. 124). In 1990, the Supreme Soviet of the USSR decided to transfer all matters of education to the sole jurisdiction of the constituent republics (Malkova 1991, p. 384). By the early 1990s, teachers were officially encouraged to adopt a more individualised approach in educational administration and democratisation became a word much in the vogue (Dunstan & Suddaby 1992, p. 11).

The school autonomy movement

Taking educational decentralisation to its extreme at the local level, that is, to the level of the single institution, is the school autonomy movement, another trend that has been taking place within the neoliberal context. Giving schools more control and authority over their governance is carried out in the belief that this will result in more effective, responsive and innovative education systems and the supply of better quality education or education of a higher standard (Keddie 2016, pp. 250–252). School autonomy can be defined as the degree to which a school is allowed to make decisions regarding its own operation (Wolhuter 2023). Smyth (2011, as cited by Keddie 2016, p. 250) states that the idea of school autonomy has been 'adopted around the world with remarkable speed and consistency' (cf. also Nir et al. 2016).

Charter schools and academies

A particular form of education decentralisation and school autonomy that has developed in the USA is that of the charter schools movement. Charter schools have been one of the fastest educational reforms gaining traction in the USA. The first charter school opened its doors in 1991; in 2022, there were over 7,000 such charter schools in the USA. Charter schools are schools that are government-funded but which are exempted from some of the local district or state regulations. These schools are usually administered by a group of individuals or an organisation under a formal contract (named a charter) issued by a regulating body within the state or district. Charter schools are regarded as public schools as they do not levy tuition fees and enrol students by means of a lottery system or application process. The rising number of charter schools has been ascribed to the school choice movement, which gives families the freedom to select the type of public education they wish for their children. Enrolments in charter schools increased from 0.4 million to 3 million students between 2000 and 2016, growing from 1% to 6% of the total school population in the USA (Badillo-Diaz 2022).

The version of charter schools that have developed in the UK are called 'academies'. Academies obtain funding directly from the government and are run by an academy trust. They have more say over how they operate than community schools. Academies do not charge fees. Academies are inspected by the Office for Standards in Education (Ofsted, the inspection system). Interestingly, Tony Blair's Labour Government in 2000 established academies through the *Learning and Skills Act 2000*. In 2010, the Conservative-led coalition government sought to increase the number of academies, making establishment of these academies easier with the *Academies Act 2010*. And indeed, it ignited a growth in the number of academies. By 2016–2017, nearly one-quarter of primary schools and the majority of England's secondary schools were academies (Barnum 2017).

Testing regime

The neoliberal economic mindset in education has brought with it a strong regimen of testing, performance appraisal and performativity. The PISA tests series (and the IEA tests, discussed in ch. 3) are but one part (if the zenith) of this testing regime. It is not only students who are subjected to a battery of tests and incessant performance appraisals but also teachers, principals and institutions.

Whole school evaluation

At the institutional level, the whole school evaluation movement was another outcome of the neoliberal economic revolution (e.g. see MacNamara, O'Hara & Angléis 2002).

Global university rankings industry

Another feature of the contemporary higher education sector internationally that carries the birthmark of neoliberal economics is the global university rankings industry. Appearing from nowhere, global university rankings emerged from around the year 2000 (see David & Motala 2017). The most well-known of these rankings are the Academic Ranking of World Universities, Times Higher Education and Quacquarelli Symonds. While these are the most well-known and prestigious, there exist dozens of global university rankings. In a competitive globalised world, universities are under strong pressure to pursue good rankings. In Chapter 9, it will be explained that universities in the Global South are in a very poor position to compete in these rankings; in fact, these global rankings reinforce the unequal playing field in which comparative and international education scholars in the Global South find themselves.

The neoliberal economic revolution and comparative and international education

In the scholarly field of comparative and international education, the neoliberal economic revolution is visible, as was explained in Chapter 1, as the neoliberal economic narrative, one of the four basic narratives, is detectable in the field. Furthermore, the neoliberal economic revolution and its impact on education are also visible in the field in the form of stringent criticism against neoliberal economics and its impact on education.

The neoliberal economic narrative in comparative and international education

That the neoliberal economic revolution induced reconstruction of education and basic philosophy of education have attracted a large following among scholars of comparative and international education is clear in the rise to prominence of themes such as the privatisation of education (e.g. see Lhungdim & Hangsing 2021), the global ranking of universities and educational outcomes or learning achievements and the determinants or correlates thereof (the salience of this theme in current comparative and international education research is evident in, for example, two recent special issues of the journal *Research in Comparative and International Education*, one on 'Raising Learning Outcomes in the Education Systems of Developing Countries: Research designs, methods and approaches', vol. 14., no. 1, March 2019, and another on 'Economic competences of young adults around the world', vol. 17, no. 2, June 2022), and, as a basis for such studies, the use of international test series data. Examples of major studies on the determinants or correlates of academic achievement on students are the World Bank's Systems Approach for Better Education Results Study (SABER) (World Bank 2013), the McKinsey Study (McKinsey and Company 2007) and the seminal study of John Hattie (2008). Besides scaffolding studies identifying the determinants or co-variants of student performance, large data sets supplied by international test series have energised a public discourse and governments taking over what seem to be the best education policies and practices. Big data sets also have a steering effect on international aid organisations policies and practices as far as their earmarking of aid to education is concerned (e.g. see Forestier & Crossley 2014; Wolhuter, Espinzoa & Mcgiin 2022).

Furthermore, studies such as Wildavksy (2010) on the relentless search and cut-throat competition for global talent in a globalised 'flat world' of a knowledge economy show how alive and relevant this narrative is in the corporate world. By the early 1990s, the World Bank had come to the fore as the largest publisher of comparative education literature in the world. These World Bank publications are typically in the mould of the neoliberal economics narrative (Wolhuter et al. 2022) (also see ch. 2 for a detailed discussion of the work and role of the World Bank in global education).

Criticism against the impact of the neoliberal economic revolution on education

Criticism against the impact of neoliberal economic revolution on education has been intense. Scholars in comparative and international education also have harshly criticised neoliberal economics in education. The first set of criticism revolves around neoliberal economics' narrow conception of the human being as nothing more than a production and consumption unit, and then from that notion, its narrow conception of education as serving no other purpose than the creation of human capital (Robeyns 2006; Rose 2003).

It should first be noted that the role of the school with respect to labour market requirements is a very old one. Schools have a history of roughly 5,500 years (the history of the first schools is, albeit somewhat cursorily, discussed in ch. 11). Two of the most widely accepted theories explaining the rise of schools are that of Yehudi Cohen (to be discussed in ch. 6) and that of Peter Gray (2013). Gray's theory connects the rise of schools to an economic (labour market) motive. According to Gray (2013), the centuries that followed the agricultural revolution required a new type of person. In a hunting and gathering economy, the individual could hunt and gather at their own, self-decided time and schedule. An agricultural economy, by contrast, asks for a more disciplined worker. For this reason, schools were founded to suppress the own agency drive and to replace it with a submissive worker who submits themselves to the prescription of society or economic order and its power structures.

However, most conceptualisations of education involve much more than that or consider education as serving other purposes. Philosopher of education Gert Biesta (2013, p. 4) distinguished between three different ways in which the question 'why do we want an education system?' or 'what do we want the education system to do (or accomplish)?' could be answered. These are (Wolhuter et al. 2022):

- Transmit particular skills.
- Open maximum opportunities to each individual learner.
- Teach the learner to adapt and to fit into society.

Finally, a fourth conceptualisation can be added, namely education to change society. This is evident in many of the motivations behind the global expansion of education since the middle of the last century, as was outlined in Chapter 1, and has also been central in the discourse on education since the publication of George Counts' (1932) seminal book *Dare Schools Build a New Social Order*?; and this was once again mooted in erudite education scholar Michael Apple's (2013) *Can Education Change Society?*.

Steyn (2021, pp. 47–48) took a more all-embracing position when he stated (much in line with the way of writing of outcomes-based education) that the aims of education should encompass:

- the self-actualisation of the learner
- preparing the learner to be a member of a family
- preparing the learner to be a citizen of a state
- preparing the learner for a career
- preparing the learner to be a member of various groupings or associations in society or the community
- preparing the child as a user of leisure time.

Even this list can be criticised for being incomplete and narrow. For example, with regard to citizenship education, there is a strong school of thought that besides (or even instead of) state citizenship, the imperative in the world of today is for global citizenship education (see Schugurensky & Wolhuter 2020; Torres 2017; Tsegay & Bekoe 2020). Clearly, the issue of the goals of education (systems) is complex, and the last word has not yet been spoken about it. What the objectives of education (systems) should be is a discourse on an issue in which students of comparative and international education can make a valuable, even indispensable input, as they tease out contextual imperatives.

Despite such strong arguments that the aims of education encompass much more than making the educand employable, vocational education has a long history of being seized to provide the key answer to the education (and societal) ills of a nation. Instances of this range from Sidney Marland ('the father of vocational education in the USA') reforms during the presidency of Richard Nixon in the USA to statements of education scholars after the announcement of the latest round of matric examination results (2022 examination, results announced January 2023), marred by a huge unemployment problem (e.g. Sinxco 2023).

A second cluster of criticisms of the impact of neoliberal economics revolves around issues of social justice. The marginalised, the destitute, the already disadvantaged and the vulnerable are adversely, even disproportionally adversely affected by education predicated on neoliberal economic principles. Thus, neoliberal economics is a force aggravating the predicament of these categories of people. For example, introducing school fees, it is argued, will keep the children of the poor out of schools, as they cannot afford to pay school fees, while, on the contrary, children from middle-class and affluent families will continue to attend school. Thus, rather than serving as an instrument of social mobility, education will reinforce existing socioeconomic stratification patterns. There is a strong body of literature on studies finding that neoliberal economic reforms result in an increase in inequalities in education (see Boliver 2017; Zancajo & Bonal 2022). Even the presence of policies such as in Chile, where the government granted education vouchers to families, was inversely related to family income; the expansion of education within the context of neoliberal economic policies could not significantly reduce education inequalities (Carnoy 1998). In this regard, it should be remembered that globally, government expenditure on education as a percentage of total spending on education is inversely related to the level of affluence of countries, a trend also indicating a disadvantaged position of those people residing in the Global South. In 2018–2019, for example, households in high-income countries accounted for only 16% of total education spending; the corresponding figure compared to low-income countries was 38% (World Bank Group 2021, p. 4).

A third stream of criticism contends that far from bringing choice to the people or empowering the community, the spate of education reform induced by the neoliberal economic agenda actually promotes centralised control and forces everyone into a 'one size fits all' and into the same 'rat race'. Neoliberal economics has, at best, got local structures to enforce the requirements and dictates of centralised powers. Finnish scholar Pasi Sahlberg (2016) coined the term 'Global Education Reform Movement' (GERM) and its acronym GERM to describe a global education trend. According to Sahlberg, this GERM trend, while it (Wolhuter 2020):

> [/]s not a universal reform movement (many nations are not following this model) is global, having the following five features: 1. Competition and choice (competition between schools, people being given a choice which schools to attend or which schools to send their children to); 2. Standardisation of teaching and learning (standardized curricula); 3. Emphasis of reading, mathematics and science, as core skills in the curriculum; 4. Corporate models of change; and 5. Test based accountability. (pp. 29–30)

Sahlberg noted that from PISA, it appears that those nations not following the GERM pattern yielded the best education outcomes (at least as measured by PISA test results) (Wolhuter 2020, p. 30). The message that Sahlberg actually put across in his studies is that much of what is sold in the modern neoliberal economic context as decentralisation, and empowering people is actually disguised as centralised control – school choice and school locus power are more than neutralised by central control over curricula and the testing and accountability regimen too is a way in which centralised power is exercised.

It is not difficult to find empirical substantiation for the criticism against neoliberal economic revolution-induced education reform contained in Fishman's GERM argument. Rose (2003, p. 78) shows with the case of Malawi how the curtailment of state funding to education did not go hand in hand with more parental choice but a continued, increased state interference in schools in the name of quality control and maintenance of standards. In especially the critique against neoliberalism in education that revolves around issues of social justice, it is the disproportionate adverse effects on the Global South that come under criticism (see Rose 2003; Dahlstrom 2009). The criticism is that as the people of the Global South are less wealthy than the people of the Global North, and as the nations of the Global South are more poverty-stricken than the nations of the Global North, the Global South is not as well equipped to handle the privatisation of education and the shifting of the burden of funding to the consumer. Another set of criticism against the impact of neoliberal economics on education revolves around the professional autonomy and role of teachers, the argument being that neoliberal economics induced education reform measures to constrain the work of teachers; that it gives rise to a narrow curriculum and pedagogy in which assessments are prioritised over meaningful learning; and that some schools are disadvantaged over others, resulting in growing achievement gaps (Lubienski & Brewer 2019).

■ Parameters for responding to the neoliberal economic revolution in the affirmation of the Global South in comparative and international education

The neoliberal economic revolution is a reality, which any reconstruction of comparative and international education cannot ignore. In a vision for a rebuilt comparative and international education in which the Global South comes to its right, a position *vis-à-vis* the neoliberal economic revolution will have to be taken. On the one hand, the neoliberal economic revolution has resulted in a booming private education sector. Together with the economic upswing which has been an inseparable part of the neoliberal economic dispensation, this has made education accessible to many more people than in the era prior to the neoliberal economic revolution. On the other hand, the discontents and excesses of the neoliberal economic revolution, and its effect on education in particular, cannot be ignored. These pertain to its detrimental effect on social justice, its undermining of the professional status of teachers and of the academic profession, its undermining of the academic autonomy of the university, its over-commercialisation of education and the narrow concept of education and of the human being (viewing the human only in terms of a human capital production and a consumer) it promotes.

Conclusion

In the immanent task of reconstructing the field of comparative and international education so as to give due space to the Global South, one major contextual factor is that of the neoliberal economic revolution. This force has enabled many salutary developments in education, such as increasing enrolments and increasing freedom of choice. At the same time, it has had negative effects on education, too. From a social justice or equality perspective, much criticism has been expressed against the impact of neoliberal economics on education. These adverse effects of neoliberal economics on education are very pronounced in the Global South. This asks scholars of comparative and international education in the Global South to dissect the contextual ecologies on their own turf very carefully, judiciously and nuancedly to eventually arrive at a balanced view of the neoliberal economic revolution in its interrelationship with education and how to steer away from its discontents while at the same time capitalising on the benefits brought by this revolution.

Chapter 6

Calls for decolonisation in education

Abstract

Comparative and international education scholars' criticism of Northern hegemony in the field and in education is also detectable in the vehement call for the decolonisation of education and of the field. This chapter proffers a definition of colonisation and from there assesses the different meanings attached to the term 'decolonisation of education'. The history of colonisation is also tracked, and it is shown that while Global North colonisation of the Global South has been a prominent part of history for the past 500 years, colonisation, in the past and today, entails much more than the North's colonisation of the South. The call for decolonisation in education is then explored. Then, the focus is narrowed to colonisation, and the call for decolonisation within the field of comparative and international education will be the subject of attention. Finally, the parameters for decolonialisation in the field and for the discourse in the field on the decolonisation of education are laid down.

Introduction

Another way in which criticism against Northern hegemony and a yearning for the affirmation of the Global South in education and in the field of comparative and international education are expressed is in the call for the

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decolonisation of education. This chapter will focus on this strand of criticism against Northern hegemony in comparative and international education. The chapter commences with an explanation of the term 'decolonialisation'. Colonialism as a factor in world history will then be explored. The focus will then shift to education as a factor in colonisation. After that, the call for decolonisation of education will be examined. Then, colonisation and the call for decolonisation in comparative and international education will be the subject of attention. Finally, the parameters for decolonialisation in the field and for the discourse in the field on the decolonisation of education will be spelled out.

Conceptual clarification

In this chapter, the following definition, the definition found in *Merriam-Webster Dictionary*, will be taken as a working definition of colonisation: 'subjugation of a people or area especially as an extension of state power' (*Merriam-Webster Dictionary* 2022, n.p.). Decolonisation will then be the countering of a state of colonisation, that is, the affirmation of people, freed from the yoke of subjugation. Huaman (2022, p. 396) explained that the concept of coloniality, at least as developed by Latin American scholars, entails four sectors of the tussle for power – economic (including land and labour exploitation), authoritative (including institutions of imperial and state power like military and courts), normative (including standards of living, constructions of family, gender and religion) and subjective (including what counts as valid knowledge and who gets to know). If this exposition of colonialism is accepted, then formal independence does not signal the end of an era of colonisation. After the formal independence of a country, colonialism – or neocolonialism, as it is then often called – can linger on in these various spheres of colonialism.

In this respect, mention should be made of two scholars in order to get to a full explication of the meaning of colonisation (and neocolonialism as the persistence of the force of colonisation in the contemporary world). The first of these books is Kenyan author Ngũgĩ wa Thiong'o's (1986) *Decolonising the Mind: the Politics of Language in African Literature*, which speaks about the persistent hegemonic effect of the colonial language (English and French) on the culture and consciousness of people in the erstwhile colonies. Thiong'o's publications can be regarded as an extension of the publications and thoughts of Caribbean psychiatrist Franz Fanon, an influential scholar in the field of post-colonial studies. In his magnum opus, *The Wretched of the Earth* (Fanon 1961), and other publications, Fanon exposed the violent impact of colonialism on the psyches of the colonised and that the colonised individual was 'stunted' by a 'deeply implanted sense of degradation and inferiority'.

Colonisation as a factor in world history

In the history of humanity, colonisation – and colonisation as broadly defined in the above definition – has been a persistent and strong feature from time immemorial. Millennia ago, the Phoenicians had numerous colonies around the Mediterranean Sea, although these were ports; that is, they occupied small tracts of land and involved small numbers of people being ruled by the colonial power.

In sync with the 'Big Man' mode of history writing, long in vogue to the point of being virtually unquestioned, imperialism as a feature of the rise of great powers (and their acts of colonisation) has been portrayed not only uncritically but also as part of the well-nigh idolising or hero-worshipping of the formation of great powers. As an example, Yale University historian Paul Kennedy's (1988) international best-selling book on the history of the world over the past half a millennium can be taken. The title of the book, *The Rise and Fall of the Great Powers: Economic Change and Military Conflict from 1500 to 2000*, is already illustrative, as it contains great powers, military conquests and economic prowess in the world as keywords. The author portrays this history as one which began around *c*. 1500 when the global scene was characterised by five possible eventual global (that is spanning the globe) empires: Ming China, the Islam world, Japan, Russia and Europe, and how Europe won. The central theme in this historian's reconstruction of the history of the world since 1500 is how Europe, or then the West, extended its hold to the rest of the world and dominated or crowded out the other empires, and much more so, the people in parts of the world not falling into the reaches or under the rule of any of these empires.

History then, at least as being reconstructed in many publications of major historians, has been a sequence of the rise and fall of great powers or empires. The very predilection of the terms 'rise' and 'fall' already indicates, at very best, a value-neutrality towards empire building (or colonisation) and, at worst, a glorification thereof. This cycle of the rise and fall of empires or powers has been reconstructed ever since the beginning of literate society five millennia ago. It commences with the ancient empires of the Indus, China, the bronze empires of Egypt, Mesopotamia, Assyria and then the Kingdom of Macedon, and in the phase of ancient history, it culminates in the rise and fall of the Roman Empire. Europe is then taken to have descended into the Middle Ages, the Holy Roman Empire being the name of the vestige of the Roman Empire and the jurisdiction of the Papacy. In the Middle Ages, there was also the rise of the Islam Empire on Europe's doorstep, the Mongol Empire, the Byzantine Empire, later the Ottoman or Turkish Empire, further away to the East the Mogul Empire in India and the Middle Kingdom in China, as well as the consolidation of power in Japan.

In Latin America, there were similarly the empires of the Maya, the Inca and the Aztecs, while in Africa there were, for example, the Kingdoms of Ancient Mali, Ghana and Songhay. All these polities were formed by expansion from a small base involving coercive incorporation.

However, looking through the prism of the definition of colonisation as proffered, since roughly 1500, a number of salient processes have played themselves out in the world; some have received attention and scathing comment in recent times, and some have been ignored. The first process was the consolidation of nation-states in Europe from the feudal system. This, too, involved an expansion from a very small territorial and social-cultural base to the coercive incorporation of adjacent territories. Whether it was in England, where the process commenced with William of Normandy, or William the Conqueror (this last title tells it all) landing with a small group of soldiers and followers and the Battle of Hastings in 1066, or the building up of France from the tiny Ile de France as a core area, Italy's incorporation of Venice or the subjugation of Wales by the English king, the forceful subjugation of territories and people in the formation of nation-states in Europe was a process that gained traction, especially after 1500 (made possible by new technology, especially gunpowder). This building of nation-states in Europe fits comfortably in the definition of colonialism. Contemporary events in places such as Catalonia and Scotland are evidence of this.

The second process was a major pattern of colonisation of the powers of Western Europe establishing colonies in the extra-Western world. These European powers were the UK, France, the Netherlands, Portugal, Spain, Italy and Germany. These colonies were in the Americas, Africa, Asia and Oceania. This first spurt of colonisation took place in the 16th century through mid-18th century.

What has received less attention is that while the maritime powers of Western Europe colonised large parts of the Americas, Africa (south, south-east and, though less so, also parts of eastern), Asia and Oceania, Russia in Eastern Europe embarked on an expansion eastward and colonised large parts of Central Asia (of which Siberia was the largest sector). The Russian state, or then the USSR, as it appeared in 1917, was the product of nearly four centuries of continuous expansion. The expansion of the Russian Empire between the end of the 15th and the end of the 19th century took place at a rate of 130 square kilometres per day (Pipes 1972, p. 111). This was made possible by the consolidation of the Russian nation-state (or the rise of the Principality of Muscovy with the election of its prince, Michael Romanov, as Czar in 1613), and even before that with the conquests of Ivan the Terrible in the preceding century. The left bank of the regions of the Dnieper River, with their Cossack populations (that is, the current Ukraine) became a Russian protectorate in 1654 (Pipes 1972, p. 111). The first systematic census, undertaken in 1897, revealed that a majority of the population (55.7%) consisted of non-Russians (Pipes 1972).

China, too, is not a homogenous cultural block that stretched into times immemorial or to antiquity (see Vickers 2022). The dominant Han of China may (and also only broadly) trace back their ancestry as far as the Ming dynasty (1368–1644); that is but a short history of a few centuries. A long history of conquests and incorporations does not confirm the official Chinese government narrative (also laid out in history textbooks used in schools in China) and the popular idea of a single Chinese civilisation with a 3,000-year history. More than half of the current territory making up contemporary China became part of the country only during the Manchu Qing Empire of the 17th and 18th centuries, frequently the result of military conquests. When the Constitution of the People's Republic of China was drawn up in 1949, more than 300 ethnic minorities applied for constitutional recognition. In the end, the Constitution finally recognised only 55 minorities. However, to this day, forceful enforcement of central hegemony, especially with respect to the Tibetans in Tibet and the Uyghur in Xinjiang, has attracted much criticism, especially from the human rights lobby worldwide. Marked indicators of this enforcement of hegemony are the Tibetan spiritual leader, the Dalai Lama, who went into exile to India after the Chinese occupation of Tibet in 1959, and the large number of 're-education' camps in which those people suspected of supporting Uyghur separatist movements are locked up and where they are forced to communicate in Mandarin and are not allowed any form of religious worship (Vickers 2022, p. 59).

The attainment of independence by the USA in 1776, then the Napoleonic Wars, and the ensuing independence of the countries of Latin America during the first three-quarters of the 19th century interrupted the age of Western colonisation. During the last quarter of the 19th century, the process of colonisation resumed, this time with sub-Saharan Africa as the major terrain of colonisation.

The decades after the Second World War were the next era of decolonisation. First, it was India (1947) and the nations of South-East Asia (such as Indonesia in 1949 and Malaysia in 1957). Then, beginning with Ghana in 1957, the countries of sub-Saharan Africa, with a spate of countries gaining independence in 1960. Critical scholars contend that while nominal or political independence has been attained, for a number of reasons, these erstwhile colonies within the world system (more so in the globalised neo-economic context) still find themselves in a vice-grip of power relations whereby they are still subjugated by the Global North (see Huaman's [2022] enumeration of domains of colonial subjugation, explained earlier).

This criticism is encapsulated in theories of post-colonialism and neocolonialism, which has also become salient in comparative and international education (see Anuar, Habibi & Mun 2021).

The third feature and trend that needs to be highlighted is that, looking through the lens of the definition of colonisation proffered above, the world has, since roughly 1960, assumed a complex pattern with somewhat different textures in the Global North and the Global South. In the Global South, many of the newly independent states were artificial creations. Especially the borders of the colonies (later independent states) of sub-Saharan Africa were drawn in Europe to suit the interests of the European powers and very little was known about these territories. One of the principles cast in iron at the establishment of the Organisation of African Unity in 1963 was that these (inherited) borders would be non-negotiable. But this created a situation of diverse societies within national borders and the possibility of subjugation of, especially, a (demographic, economic or political) minority or minorities. The countries of the Global North, on the contrary, were the place of an influx of migrants since the 1960s. These migrants came from extra-Western countries. The relatively homogenous make-up of the societies in the Global North was thus disturbed as these societies became increasingly diverse or multicultural. Eventually, the Creed of Multiculturalism developed.

A fourth feature is that because of, among others, the ICT revolution, all societies have become even more diverse in recent decades and years. The scheme of the age of multiculturalism a generation ago, of societies consisting of a limited number of static cultural groupings, as far as it was a true portrayal of reality, appeared to be more and more obsolete. The term ‘hyperdiversity’ has recently gained traction to describe this new, more richer diversity characterising modern societies. The Creed of Interculturalism has superseded the Creed of Multiculturalism (see Council of Europe 2008; Wolhuter & Van der Walt 2022).

Education and colonisation[7]

Very few scholars have yet tried to reconstruct and provide an explanation as to why the first schools in history came into being, judging by citation data, the two explanations on the origin of schools that can lay claim to being the most subscribed to are the theories of Cohen and of Gray (discussed in ch. 5). According to the theory of anthropologist Yehudi Cohen (1970), schools were established for the first time in human history in what he names ‘civilisation states’; such states are what he defines as states formed by the amalgamation of smaller political units. Examples of

7. This section is based on a more than 50% reworking of Wolhuter (2019, pp. 10–28).

such states include ancient Egypt, Mesopotamia, China and ancient Athens. Such states need the training of a small elite and attendant bureaucracy for the operation and continuous existence of the state. Among these elite groups, local loyalties towards smaller political, geographical and social entities had to be eliminated or at least controlled and superseded by loyalties towards the new state superstructure. For this reason, schools were established.

Cohen (1970) explains the calling into the existence of public national systems of mass (primary) education since the 19th century (first in Western Europe and North America; later followed elsewhere in the world) from the same rationale as was the case in the ancient civilisation states. Those who formed the governments of these newly created nation-states, formed by means of the amalgamation of a large number of smaller feudal units, had to cultivate loyalty towards the new, bigger political unit and a common culture, and schools were used as an instrument for accomplishing this process. This in itself was a colonial exercise, as colonialism was defined earlier. Schools or education served as instruments of this kind of internal (intra-state) colonialism. When, in the colonial era since roughly 1500, this Western European school prototype was transplanted to the extra-European world, a process known as colonial education, which also operated as an instrument for suppressing or denying indigenous cultures and for enforcing down the culture of the colonial rulers, that is, of the metropolitan powers in Europe (e.g. cf. Haldane 2012). The elite English schools of South Africa have, at one point, been described as 'nurseries of imperial patriotism' (Jansen & Walters 2022, p. 1). In Australia, there was the phenomenon of the 'stolen generation' – children of first-nation people were forcefully taken from their parents to be deliberately educated into Western culture, away from any contact with their parents (see Van Krieken 1999), a practice which continued well into the 20th century.

However, it should also be noted that in so far as extra-Western governments have been able to decolonise or indiginise education (meaning breaking away from the inherited colonial template) in the post-independence era, most of these countries in the Global South are artificial creations, created during the colonial era to suit the interests of the colonial powers. Within the borders of these states are diverse populations, and with one of the primary objectives of the education systems these new governments build with great speed in Africa after independence (Thompson 1981, p. 53) being the moulding of national unity, it is easy to speculate that education also becomes an instrument for internal colonisation. In independent Malaysia, for example, after independence, the use of Chinese as the language of instruction in schools has been severely downscaled, limited to primary schools. This is despite the fact that a substantial percentage of the citizens are Mandarin first language speakers (at independence, 35% of the population). In pre-independence times, there were Mandarin medium secondary schools, phased out after independence. Attempts by the Mandarin-speaking community to establish their own fully self-funded private university, Merdeka University, were not allowed by the government. The other significant language minority group in Malaysia is the Tamil-speaking community, making up about 10% of the total population of Malaysia. While there were Tamil-medium schools in colonial Malaysia, all these were closed down after independence as per the policy directive of the government.

The call for decolonisation

Not only was colonisation a strong force in the making of the world (past as well as present), it was an accepted part of the making of the world. Historians uncritically accepted this state of affairs, even lauding it without any fear of gainsay. Such historians portray nations or civilisations in a cycle of colonisation as rising or great and those contracting or decolonising as being in a state of falling or declining (e.g. Kennedy 1988; Toynbee 1948–1961).

The first morally strong statement against colonisation in the centre stage of world politics came only as late as the beginning of the 20th century when, coinciding with the USA becoming economically and politically the leading power in the world, USA President Woodrow Wilson, drawing on the history of his own country and on what he saw happening in the world during the First World War (the demise of the Ottoman Empire and disintegration of the Austria-Hungarian Empire), proclaimed his principle of 'the right to self-determination of nations' at the peace negotiations at Versailles and at the establishment of the League of Nations. A precursor or foreshadowing of this, however, was the Munroe Doctrine or policy (although this policy was informed more by North American interest than by altruistic motivations). The nations of Latin America used the opportunity of the European powers being weakened and occupied by European matters during the Napoleonic Wars at the beginning of the 19th century, and one after the other seized independence. When, after the conclusion of the Napoleonic Wars, the European powers commenced to mobilise to reassert control over Latin America, North American president James Munroe issued what became known as the Munroe Doctrine, namely that the USA would not tolerate any interference by European powers in the Americas. The historical outline presented in this paragraph should be qualified on two points. Firstly, the Munroe Doctrine was not so much a statement against colonisation as a statement that the USA would not tolerate any outside interference in the Western Hemisphere, which it was part of, and for the rest of what it considered to be its sphere of influence or its own backyard. Secondly, for all its noble ringing, Woodrow Wilson's principle of the right to self-determination of nations was very limited, and he himself did not realise the full (practical) implications of his doctrine (in world politics).

However, Woodrow Wilson's 'right to self-determination of nations' received further impetus during the Second World War with the 'Trans-Atlantic Charter' of 1941. The charter followed the Trans-Atlantic Conference, a summit between the prime minister of the UK, Winston Churchill, and North American president Franklin D Roosevelt in August 1941. This charter, which spelled out the war aims (the aims of the Second World War) of the allied powers and which guided the involvement and role of the USA in the Second World War, once again confirmed the 'right to self-determination of nations'. It was taken up in the charter of the UN, an international body set up at the conclusion of the Second World War in 1945, with the aim to usher in a new global political order that would ensure everlasting peace. Section 55 of the charter acknowledges the 'right to self-determination of peoples' (UN 1945), significantly now the self-determination of *peoples*, no longer *nations.*

These developments and the basis for a new global political dispensation were conducive to the decolonisation of the existing colonial empires of the world at the time. In any case, the weakened (by the exigencies of the Second World War) European powers were no longer in a position to enforce their rule in far-flung empires. The Netherlands came out of the war so weakened that Indonesia declared independence on 17 August 1945, almost immediately after the conclusion of the Second World War. After a war of independence, the Dutch government transferred sovereignty in 1949. India – the jewel of the British Empire, the most populous British colony, with a population more than seven times that of the UK, attained independence on 15 August 1947 and set in motion the rapid liquidation of the British Empire. The French Indochina War (1946–1954), in turn, ignited the liquidation of the French Colonial Empire. Belgium hurriedly prepared and then granted independence to its colony, the Congo, in Africa, on 30 June 1960. Other colonial powers in Africa followed suit.

The call for decolonisation in education

Recently, calls for decolonisation in education have grown (see Jansen & Walters 2022). Even contemporary fashionable trends in education that at first glance may have moved beyond a colonial outlook or mentality such as global citizenship education (e.g. see Saito et al. 2023), or movements such as the SDGs (e.g. Macintyre, De Souza & Wals 2023) that appear or are marked as having been crafted by humanity as a whole, have been critiqued as being – at least in its present form – an instrument of persistent coloniality.

The term 'decolonisation' appears in the public and even in the scholarly discourse, attached with different meanings. Writing under the heading 'What is this thing called decolonisation?', South African academic Jonathan Jansen (2017, pp. 156–163) distinguishes between six meanings, particularly in the way in which the term appears in the scholarly and public discourse on education in South Africa:

- **Decolonisation as the decentring of European knowledge:** Colonial knowledge is here seen as centring, privileging or absolutising the experiences, perspectives, ideals, values and interests of Europe.
- **Decolonisation as the Africanisation of knowledge:** Jansen (2017, p. 159) views this as the hard version of the decentring of European knowledge. Now (what is regarded as) European knowledge should not be removed from the centre and move to the periphery or in a line equal to other regimes of knowledge, but it should be replaced (i.e. wiped out) by the ideals and achievements of Africa. The curriculum should be about Africa.
- **Decolonisation as additive-inclusive knowledge:** This is a soft version of decolonisation. The established canons of knowledge are accepted but ask for recognition of new knowledge and having it added to conventional curricula, that is, an expansion of the curriculum.
- **Decolonisation as critical engagement with settled knowledge:** This kind of decolonisation is not so much concerned with repositioning or replacement of knowledge but rather aims at empowering students to critically engage with or interrogate existing knowledge. The validity of existing knowledge is critically examined and questioned, and the assumptions underlying existing knowledge are made explicit and interrogated. The same or new problems are seen differently by means of new theories, perspectives, paradigms and methods.
- **Decolonisation as encounters with entangled knowledge:** Proponents of this kind of decolonisation refrain from dividing knowledge in watertight compartments of 'us' and 'them' or 'West', 'East' and 'South'. Every bit of knowledge is regarded as the outcome of 'interwoven' knowledge between coloniser and colonised (Jansen 2017, p. 162). Thus, in a shared space in society or in the world, the erstwhile coloniser and erstwhile colonised should construct new knowledge.
- **Decolonisation as the repatriation of occupied knowledge:** This is a hard form of decolonised knowledge. This conceptualisation regards education as a powerful instrument to disturb or disrupt accepted knowledge and, in that way, instigate or initiate the construction of a new corpus of decolonised knowledge.

The idea of decolonisation in general, as well as each of the mentioned possible meanings, is fraught with difficulties. For a start, it is difficult to determine what exactly is knowledge of the coloniser and what is knowledge of the colonised. Here, the example of the most often used textbook in comparative and international education courses at universities worldwide can be taken. This book, *Comparative Education: The Dialectic of the Global* and *the Local*, edited by Carlos Torres, Bob Arnove and Lauren Ila Misiaszek (2022), admittedly has a preponderance of authors from the Global North, even in chapters dealing with the Global South (a shortcoming of the field of comparative and international education which will be returned to in detail in ch. 9). Should all chapters in this volume written by Northern scholars be rejected as colonised or colonialism mindset-tarnished knowledge and thus be declared invalid, and only those chapters authored by Global South scholars be accepted as valid knowledge?

The next problem with the decolonisation of education is that, even if a clear-cut definition can be found, the erstwhile colonies all struggle to effect any significant decolonisation or break away from inherited colonial education models. This can perhaps be best illustrated with the case of India. As was explained earlier, India was the most populous colony and set the trend for the spate of post-Second World War colonies gaining independence, gaining as it did its independence in 1947. Even three years before independence, in 1944, the Central Advisory Board of Education in India set up a commission to plan a national education system for India (see King 1979, p. 421). The report of the commission became known as the 'Sargent Plan' and was named after its chairperson, sir John Sargent, who was education commissioner at the time. While including many Indians of proven independence and knowledge, it was quickly deemed by the political elite in India to be foreign, that is, an exercise in colonialism (King 1979, p. 421), and shelved. Instead, another commission was set up under Daulat Singh Kothari, who was the hairperson of the University Grants Committee. It published its plan, which became known as the Kothari Plan, in 1966 (King 1979, pp. 422–425).

To complicate matters further, the discourse on the decolonisation of education in South Africa has, for a long time (reaching back right to the beginning of the 20th century), to a considerable extent taken its cue from critical race theory in the USA rather than from the discourse of decolonisation elsewhere in Africa, Asia and Latin America (cf. Webster 2020).

Colonisation and the call for decolonisation in the scholarly field of comparative and international education: Parameters

Colonisation has been an undeniable force in history and contains many discontents and writing – as is the case for this chapter, book and author – from the Creed of Human Rights as the norm contains many aberrations.

Education and knowledge enforced as part of the coercion of colonisation, knowledge that cannot pass the test of rigorous research requirements and education that violates human rights can therefore not be condoned, and as far as the call for the decolonisation of education constitutes a call for the rectification of these aberrations, it should be welcomed. To link to other chapters in this volume, as far as colonisation has entailed racism (ch. 7) or promoted the creation of an unequal field for scholarly activity (ch. 9), the call for decolonisation in education in general and in comparative and international education in particular should be supported. Similarly, colonisation has entailed the suppression of IKSs (cf. ch. 8), while decolonisation constitutes a force promoting the use of the full cultural and knowledge treasures of humankind and giving these spaces in education and knowledge structures. If decolonisation serves the purpose of promoting human rights education (education as human rights, education through human rights and education for human rights; cf. ch. 3), it should certainly be welcomed. These shall include, for example, making education institutions as safe spaces and positive, meaningful lived experience for both educand and educator.

However, a number of caveats and parameters should also be noted. Firstly, while the colonisation by the Global North of the Global South constitutes a major vector of colonisation in current and recent world history, this is by far not the only form of colonisation that is of that ever was. The call for decolonisation should therefore not be narrowed down to a call for the Global South to be decolonised from Northern hegemony. Moreover, the call for decolonisation cannot be turned into an invective against the Global North. Writing from the Creed of Human Rights as a moral code and a belief in the three global commons of Carlos Torres (cf. ch. 2), decolonisation as a blanket criminalisation of the Global North and all its people cannot be accepted. Within the scholarly project of comparative and international education specifically, the entire exercise of decolonisation of the Global South should be explored and researched with the ultimate aim of guiding the decolonisation of all forms at all levels required in the contemporary world. This includes internal decolonisation (i.e. obliterating hegemonic power of centralised state structures in both the Global North and the Global South) and colonisation enabled by globalisation, neoliberal economics, foreign aid and international agencies (as explained in other chapters in this volume). In this way, the taking up and development of the decolonisation theme by scholars of comparative and international education can be an exercise of praiseworthy emancipation, eventually feeding into the human capabilities project (to be explained in ch. 12), required by the world and craved by all humans. Related to this proviso, it should also be added that every issue in the contemporary world and every conflict in every part of the world cannot be deconstructed or reduced to a scheme or oppressive dynamics of coloniser versus colonised. This is often done by social commentators (e.g. see Buccus 2023) and can, at best, constitute an oversimplification of a complex issue; at worst, it can be a totally erroneous analysis, leaving out of the analysis a consideration of the human rights of people.

Decolonisation and the pursuit of social justice at national levels cannot take place at the price of lowering the quality of education, that is, within the globally competitive field of which education institutions in the Global South are a willy-nilly part (cf. Habib 2023, p. 11). Connected to decolonisation, the social justice narrative (of which decolonisation is one major, irremovable tenet) has gained traction in the field of comparative and international education. Therefore (Wolhuter, Espinoza & McGinn 2022):

> Social justice refers to the distribution of wealth, opportunities, and privileges within a society. Piketty (2020, p. 967) defines a just society as 'one that allows all of its members access to the widest range of fundamental goods'. Human beings should be treated equally, and opportunities and resources should be made equally accessible to all. (n.p.)

Conclusion

What is needed as part of the new era in the development of comparative and international education, a new era with the defining feature of the affirmation of the Global South, is the bringing to the surface and as part of both the scholarly and public discourse of education any vestiges of colonialism and decolonisation of the Global South. Such an exercise cannot, however, be turned into a blanket criminalisation or discarding of anything pertaining to or originating from the Global North, nor should any inhuman practice in the Global South be condoned. What is brought about as a corpus of corroborated knowledge on decolonisation guiding the decolonisation of education in the Global South versus the Global North should proceed, but what should also be included in decolonisation scholarship is internal decolonisation in the Global South as well as any need for decolonisation in the Global North.

Chapter 7

Criticism against racism in comparative and international education

Abstract

In contemporary comparative and international education, criticism against Northern hegemony also appears in the form of criticism against racism in education and in comparative and international education. This chapter proffers a definition of racism and cautions against such criticism easily going over into a(nother) kind of racism itself. It is also argued that racism cannot be combatted by resorting to anti-social behaviour or by violating the human rights of any person. Having said that, it cannot be denied that racism is a factor inhibiting the Global South from coming to its right in education in the world and in comparative and international education. This racism, and any other form of racism, should be resisted and eradicated by scholars in the field. In countering racism and in constructing a field more aligned to the noblest of intentions that have given rise to comparative and international education, intercultural education is suggested as most promising. Cultivating intercultural education scholars of comparative and international education can contribute to crafting a worthy scholarly field and a humane global education project free of racism.

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Introduction

Another strand of the criticism against Northern hegemony in education and in comparative and international education is criticism against racism. An example of racism once again taking centre stage in the discourse in the field is the recent publication of Britto, Costa and Waltenberg (2023) – published in the top journal in the field – about racism being a top ingredient of presenting racial inequality in education in Brazil. While subscribing to the thesis that racism is present in attitudes of those of the Global North against those residing in the Global South, this chapter argues that this is not the only form of racism present in the world and that racism of all kinds should be combatted, also by scholars in the field of comparative and international education. Furthermore, allegations of racism cannot be abused as a cover for anti-social behaviour.

This chapter begins with an attempt to define the notion of 'racism'. A historical perspective is then given on how a passion for anti-racist education came to the fore in the contemporary world. That is followed by a discussion of the call for anti-racism in comparative and international education.

Conceptual clarification

An 'ism' is a suffix denoting a radical central positioning of something (the root before the 'ism'), reducing complexity or diversity to this one thing placed centrally or declared absolute. Hence, 'racism' will mean putting race central, determining everything else, explaining everything else and looking at everything through the prism of race, looking no further than race and seeing nothing more than race. This is the meaning attached to the term 'racism' in this chapter and book. Furthermore, to clarify the concept of racism, Arneback and Jämte (2022) highlight as a feature the harbouring of fixed ideas about people of a particular race group and the display of hostility towards people of a particular race group. These scholars also described racism as a range of arrangements based on ideas and constructs, excluding people from fully living and participating in societies (Arneback & Jämte 2022).

Historical perspective

The decolonisation of large parts of Africa, the Middle East and Asia during the decades after the end of the Second World War, as described in Chapter 6, was one factor in the rise of a sentiment of anti-racism in the public socio-political discourse worldwide. Another was a related development in the USA. One obstacle in the way of moulding national unity and the consolidation of the power of the central government with the establishment of the USA in 1776 was the situation of the slaves. Slavery was concentrated in the Southern states of the USA. The American Civil War (1861–1865) did result in the de jure freeing of the slaves, but segregation and inequality persisted, de facto as well as de jure – the latter by means of the 'Jim Crow' laws – in the Southern states of the USA (Giliomee 2019). Resistance picked up momentum during the 1950s and 1960s with the black civil movement. While this resistance resulted in the 1964 *Civil Rights Act*, the battle was not over by a long stretch. In fact, this Act provided the basis for a stream of litigation and served as a point of reference for the public discourse which continues to this day in the USA.

Furthermore, two series of events expanded the attention to racial inequality worldwide. The first was the decolonisation or advent of independence in large parts of the Global South during the decades after the Second World War, especially in (South and South East) Asia and Africa. This was especially – but by no means limited to – in colonies with substantial numbers of people of European descent, such as Kenya, Algeria, Zambia, Zimbabwe, Namibia and South Africa, where the problem of equality or equity among the different racial groups was pushed to the centre stage of public as well as scholarly discourse (particularly in – but by no means only in – the social sciences). From this discourse developed critical race theory. Critical race theory is a cross-disciplinary examination by scholars in the social sciences and of civil rights scholars as well as by activists of how laws, social and political movements and media affect, and are affected by, notions and depictions of race and ethnicity (see Delgado & Stefanic 2001).

Anti-racist education in the trajectory of the development of multicultural education and intercultural education

Ever since the end of the Second World War, education in especially many Western countries (which has been portrayed as the major, even only, culprit of racism) has been considered an important arena in which to fight and put an end to racial oppression and discrimination (Lynch, Swartz & Isaacs 2017). In the education sector, the groundswell of anti-racism during the past 75 years has resulted in anti-racist education, which in turn became subsumed in the broader movements of first multicultural education, followed by intercultural education. Anti-racist education has been present for decades. In the entire history of education and the development of the Creed of Multicultural Education (later superseded by intercultural education), it had an interesting, if ephemeral, place.

Since their inception some five millennia ago, formal education systems have served to legitimise or foist down the culture of the ruling or dominant group in society. This is made clear by the hypothesis of Yehudi Cohen (discussed in detail in ch. 6) – in countries where mass immigration featured, such as the USA, education systems served as an instrument or arm of broader policies of assimilation (Tanaka, Farre & Ortega 2018). It does not require much imagination to see that such an education policy or creed is open to ideas and practices of racism. However, by the 1960s, this approach, in view of the increasingly multicultural and multiracial (to use a word presently somewhat discredited but in vogue at the time) composition of the societies of Western Europe and North America, and the civil rights movement in the USA, became increasingly untenable (see Wirt 1979). It was in this context that the Creed of Multiculturalism and multicultural education developed, and it became especially strong in Western Europe and North America. Canada, the first country to formally adopt a policy of multiculturalism and to promulgate an *Act of Multiculturalism*, came to be regarded in the comparative and international education scholarly community as a model of multiculturalism and multicultural education (see Wolhuter 2013).

Multiculturalism, which can be described as giving positive recognition to cultural diversity, itself went through a developmental trajectory. The very incipient phase of (token) add-on of elements of cultures from cultures other than the hegemonic culture went over to (at least in theory or policy or on paper) a recognition of such other cultures as variations equal to the hegemonic culture in worth and status. Then, out of concern for xenophobic attacks and violent interracial, intercultural and interreligious conflict, multicultural education in the next phase became intertwined with anti-racist education (cf. Leicester 1992). In a yet later phase, amidst the increasing emphasis branches of social science such as sociology placed on power relations (a trend also visible in comparative and international education, in Phase 6, heterodoxy, as explained in ch. 1), multicultural education acquired a strong colour of anti-oppression education (see Kumashiro 2002).

Finally, socio-political developments occurring in the opening decades of the 21st century, brought to a head by the 9/11 catastrophe, brought educators and educationists to the belief that the late-20th-century postmodern attitude (cf. Phase 7 in the development of comparative and international education, heterogeneity, as explained in ch. 1), resulting in an uncritical and unqualified acceptance of cultural and other forms of diversity and to a casual acceptance of differences among people and their cultures, had to be counterbalanced by an approach seeking to create greater consensus and cohesion among all these centripetal cultural, social and political forces.

As a response to this new context, interculturalism and intercultural education have evolved. Interculturalism has been found to rise to the challenge in four ways, according to Markou (1997). It promotes:

- education in empathy, that is, the idea of a deep understanding of others, of putting oneself in their situation
- education in solidarity, that is, the idea of cultivating a collective conscience for the promotion of social justice
- education centred on intercultural respect
- education that stimulates ethical thinking and dialogue.

In each of the three world regions where intercultural education has developed so far, namely, Western Europe, North America and Latin America, it has taken a different shape contingent upon the specific societal and cultural context (see Pica-Smith, Veloria & Contini 2020).

Intercultural education has recorded both successes and shortcomings (see Wolhuter & Van der Walt 2022). However, in order to take place successfully, Wolhuter and Van der Walt (2022) identified a number of preconditions. These are an intercultural education programme for South Africa should be tailored to the particular sociocultural context and that educational institutions, such as schools and universities, should become spaces where students and teachers feel safe and willing to participate in a free and open intercultural discourse with others from widely different cultural backgrounds (Wolhuter & Van der Walt 2022). These are important to note here, as later in this chapter, intercultural education will be suggested as the best way to combat racism in comparative and international education in a way consonant with the Creed of Human Rights.

Inequality and inequity in education and racism

Racial inequality in education (at all levels: access to education, survival or dropout rates, or achievement levels) is a worldwide problem. In fact, racial and ethnic inequality is, together with socioeconomic descent and gender, described as one of the trinity in educational inequality. This inequality has been under the spotlight of education scholarship since at least the 1960s. It has been studied from a variety of theoretical frameworks. However, only recently has racism in society and in the education system been added as a theoretical lens or contributory factor. An example of this is seen in Theodoro’s (2022) research on racial inequality in education in Brazil. It should be remembered that Brazil is, after Nigeria, the country in the world with the largest number of people of African descent (De Almeida 2003) (the reason lies in the trans-Atlantic slave trade, discussed in ch. 4). Brazil is not only a country with a very high Gini index (i.e. a high level of socioeconomic inequality) but also a country with much inequality in education (see McCowan & Bertolin 2020). Britto et al. (2023) explain how Brazilians of African descent experience – through a system of institutionalised formal and informal rules and values in Brazilian society – racism and unequal treatment and how these result in education inequality in Brazil.

Criticism of racism in comparative and international education

It is not difficult to detect incidences of even overt racism or racist attitudes in the history of comparative and international education, including up to recent times. Leading figure in the field and the first editor of the journal *Comparative Education Review*, William W Brickman (1950), contended that the aim of cultural exchanges, international student exchanges and mutual understanding through school instruction was the 'rehabilitation of backward cultural areas' or proposed notions of helping 'retarded cultures of backward peoples through the instrument of education' (Brickman 1950, cited in Goodenow & Cowen 1986, p. 277).

In recent times, the call for anti-racism in comparative and international education and criticism that, historically, the field has been beset by racism has become more pronounced, while the study of racism in education has become more visible on the comparative and international education research agenda and in publications. An example of the latter is the recent article by Walters and Jansen (2022) about racial science in Human Anatomy research in South Africa. An example of the former (criticism against racism in the field, especially at pivotal points during its historical evolution) is the identification by a leading comparative and international education scholar established in the field and located in the Global North (Epstein 2018) of incidents of racist biases by key figures and publications in the historical development of the field. In this article, entitled 'The Nazi seizure of the international education review: A dark episode in the early professional development of comparative education', Epstein reconstructed the beginning and early history of the *International Education Review* – a pioneer journal in the field of comparative and international education (after the Second World War revived with the title *International Review of Education*, the oldest running journal in the field) – in the 1930s. Epstein shows how the journal had a commendable beginning, but after three or four years, it was taken over by Alfred Baümler, an outspoken anti-semite who lent himself to the carrying out of the Nazi plan (Epstein 2018).

In her 2004 CIES presidential address, Kassie Freeman focused on education and the development of human potential, but made special mention of how education systems have failed people in black communities. Freeman (2004) explains the negative effect on those whose potential is underutilised:

> Having their talents underutilized over the centuries has had a negative impact on the psychological being (self-esteem and confidence) because the costs of underutilizing their potential has gone to the heart and soul of black populations. (pp. 451–452)

The George Floyd incident of 2020 gave a new thrust to the call for anti-racism in the field, as is clear in, among others, the choice of a theme (illuminating the power of idea/lism) and a venue (Minneapolis, where the George Floyd incident took place) for the 2022 CIES conference. A top journal in the field, *The Comparative Education Review*, published a 'Black Lives Matter: Statement and Action Plan' (Comparative Education Review 2020). This was followed two issues later in the journal (February 2021) with an editorial comment entitled 'Sixty-Five Years of the Comparative Education Review: Black Lives Matter, Ethics, New Directions, and New Ideas', in which editor Bjorn Nordtveit (2021), on the occasion of the 65th anniversary of the journal and spurred by the George Floyd incident, undertook to throw the full weight of the journal into the campaign to counter ongoing policies and practices in comparative and international education which are prejudiced against black, indigenous and people of colour (BIPOC). This would be done, among others, by seeking submissions and publishing articles that lie at the intersection of anti-racism and comparative and international education.

Parameters

As in the case in the call for decolonisation, this author does not subscribe to the contention that racism is the exclusive preserve of people of any one particular racial category. Racism cannot be used to criminalise a particular group or category of people of a particular racial, ethnic, linguistic or religious category *in toto*, and racism cannot be used as a pretext for anti-social behaviour (cf. Pauw 2022, pp. 14–15) or – mindful of the parameters from which this book has been written and its argument presented, as explained in Chapter 1 – to justify any violation of the human rights of any person. For this reason, trends and practices such as cancel culture, wokeism and critical race theory (see Butcher 2022; Goosen 2022; Zille 2021) constitute a clear red line in any project of combatting and eradicating racism in education and in comparative and international education. Apart from violating the rights of others, cancel culture and wokeism in themselves represent instances of racism, as per the definition of racism proffered. There is always the danger of vigilance against aberrations such as racism going over into the 'intolerance of tolerance'. Dinesh D'Souza (1991), writing as a student from India in the USA, wrote on his impressions and experiences of life on a North American university campus in his book, *Illiberal Education: The Politics of Racism and Sexism on Campus*, portraying how the extreme political correctness of the late 1980s resulted in a fear of speaking out, of divisions and of the loss of individual liberty. How harmful the results of critical race theory can be to academic excellence and individual agency in education has been explained in Burke, Butcher and Greene (2022). How easily the direction of racism can be reversed in any project of societal reconstruction or transformation has recently again been illuminated in North American journalist Eve Fairbanks's (2022) book comparing recent societal reconstruction in South Africa and the USA. The most promising vehicle to combat racism seems to be that of intercultural education. However, as was explained, such intercultural education should also take place within a set of particular parameters.

For these same reasons, respect for human rights, and caring for the environment (which is also one of the motivations behind the SDGs) considerations, practices such as *Izikhothane* subculture (see Ngcongo & Mnisi 2023) cannot be condoned. The proviso should also be added – and this is related to the proviso that racism cannot be claimed to be the preserve of only one group of people – that every conflict and contentious issue in the world or society cannot be reduced to or contorted to fit the racial caterogisation and accompanying blame. Such an objectionable analysis of global or societal issues occurs too often in the public discourse (e.g. cf. Buccus 2023). Rather than absolutising race and a racially based scheme of apportioning blame, in line with the thesis of this volume, the Creed of Human Rights should be placed central and taken as a yardstick.

■ Conclusion

Instances of racism have been tarnishing the image of the noble cause of education and of comparative and international education historically as well as today. It cannot be denied that racism is a force inhibiting the Global South from coming to its right in the field of comparative and international education and in education. However, in the argument proffered and from the literature cited above, it is clear that racism against Global South peoples is not the only kind of racism.

As such, vigilance should be exercised in the field, and the field should be purified of any instances or vestiges of racism. However, racism (real or alleged) cannot be used as a pretext for aberrations such as anti-social behaviour or violation of the human rights of any person, and, least of all, one form of racism cannot be eradicated with another form of racism.

Intercultural education appears to be the most promising vehicle at the disposal of scholars of comparative and international education to combat and eradicate racism, as well as the kind of racism reinforcing the Northern hegemony in the field. By building on a theory and guiding the practice of intercultural education, scholars of comparative and international education can serve as a tracklaying vehicle to pave the way for a more humane 21st century.

Chapter 8

Appreciation of indigenous knowledge systems

Abstract

Criticism against Northern hegemony in the field of comparative and international education has also become visible in the call for the appreciation of IKSs. This chapter clarifies the concept of indigenous knowledge and points out the presence of calls for the appreciation thereof by scholars in the field. The chapter argues that while the exploration of IKSs and the incorporation thereof in the field have promised to enrich the field, this should take place within a set of parameters. Such knowledge should still be validated by the rigours of the scientific process. All existing knowledge (i.e. extra-indigenous knowledge) cannot be discarded and deemed irrelevant or invalid. Furthermore, the Creed of Human Rights and the Global Commons draw a clear perimeter as to how such knowledge can be put to use to further the noble goals of education and the objectives of the field of comparative and international education.

Introduction

Another way in which criticism against Northern hegemony and a yearning for the affirmation of the Global South in education and in the field of comparative and international education is perceivable is in the appreciation of IKSs. The contention is that the scientific revolution,

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which began in Western Europe in the 17th century (and which is an inseparable aspect of the entire project of modernisation, as laid out in ch. 2), has produced a corpus of knowledge by means of the scientific method. The community of scholars was based in Western Europe, and with the colonisation of North America and the expansion of Western hegemony (as explained in earlier chapters) and finally, in the age of globalisation, their corpus of knowledge derived from the use of the scientific method and within the context of the Western cultural bloc has become the accepted canon, as if they had a monopoly on the production of knowledge. Their outlook, shaped by their contextual background, has limited the scope and possibilities of their knowledge-building project. The fact that their linguistic competence was largely based on Western languages further limited the potential scope of their project (this aspect will be explained in this chapter). Therefore, the resource base from which they could build knowledge was limited, too. Extra-Western cultural treasures were largely excluded. The re-appreciation of IKSs is an attempt to rectify and enrich this preposterous body of knowledge.

For a long time, scholars of comparative and international education have unquestioningly accepted the (Western-derived) canon taught in educational institutions and held that as the only truth. Recently, calls have been rising for the appreciation of outside knowledge that has been produced within this steam-circuit of the Western experience – processed by the scientific method bequeathed by the Enlightenment and the scientific revolution (e.g. see De Sousa Santos 2014; Keane et al. 2023). That means a call is made for the appreciation of IKSs. In 2004, the Department of Science and Technology in South Africa released a policy paper on IKSs (RSA 2004).

This change is in line with developments in various branches of education scholarship (e.g. see Cronjé 2015; De Beer 2016; De Beer, ed., 2019). It also occurs in tandem with trends in other scholarly fields, such as botany and the medical sciences, as well as in the humanities and social sciences. An example is the passionate call by Harrison (2007) to prevent languages other than the main languages in the world from going extinct. During the last decade, scholarships in comparative and international education and other fields of education, from scholars in Africa pleading for IKSs to come to its right, have begun to appear too (e.g. see Adeyeye & Mason 2020; Hlalele 2019; Kaya & Seleti 2013; Quaynor 2018).

The neglect of IKSs in the entire range of scholarly fields is a very broad theme. In the first book on the history of West Africa (as a region), author JD Fage (1969) commenced his history with the following illustrative personal anecdote:

> When, in 1949, I was lucky enough to be appointed as one of the first lecturers at the University of Ghana, it struck me that history students tend to be much better informed about the history of Europe than about the history of Africa. (p. i)

The following is by no means an atypical case of a book purporting to offer a conspectus of the total stock of knowledge in a particular scholarly field. Grayling's 680-page history of philosophy (Grayling 2019) is, in terms of the number of pages, more than 95% about the history of Western (European and North American) philosophers and their thoughts and writings.

Tying with the call for the decolonisation of education (explained in ch. 6), Roberts (2023) argued for the harnessing of IKSs as an instrument or a resource to be used in the exercise of decolonising education. This is also a line taken and elaborated by Dei (2008). Bringing in indigenous knowledge as a perspective counters the colonial, imported content of education.

■ Conceptual clarification

Tharakan (2017, p. 1) defines IKSs as 'knowledge developed within indigenous societies, independent of, and prior to, the advent of the modern scientific knowledge system (MSKS)'. The new resource of IKSs lies largely (though not exclusively) within Global South cultures.

■ The occurrence of interest in indigenous knowledge systems in comparative and international education

The recent growth of interest in IKSs among scholars of comparative and international education is detectable on a number of fronts.

The increased interest in IKSs among the comparative and international education scholarly community is evident in inter alia the formation of a special interest group (SIG) within the CIES on indigenous knowledge. In August 2022, the top journal in the field, *Comparative Education Review*, published a special issue titled 'Comparative Indigenous Education: Indigenous Knowledge Systems and Research toward Decolonial Educational Practices'.

Comparativists such as Birgit Brock-Utne (2010) took part in investigating the potential of indigenous languages, knowledge and epistemologies for education and education research. Another indication of the re-appreciation of IKSs and their potential for the field is the recent (2016) CIES presidential address of N'Dri Assié-Lumumba (2017) on *Ubuntu* (indigenous African philosophy).

A measure of how topical indigenous knowledge (and related themes) is in the broader family of education sciences is the recently published volume, *Handbook of Research on Teachers of Color and Indigenous Teachers*, edited by Conrad Gist and Travis J Bristol (2022), published by the American Educational Research Association (AERA) (their first publication of this kind). An interesting development is trans-indigenous education, which can be defined as spaces, practices and programmes that allow diverse histories, cultures and experiences to be shared among diverse indigenous students (Vaughn & Ambo 2022). From a study of such trans-indigenous education between two indigenous groups in the Los Angeles basin in the USA, the American Indian/Alaska Native (AIAN) and Native Hawaiian/Pacific Islander (NHPI) students engaged in trans-indigenous education, Vaughn and Ambo (2022) concluded that such education programmes have the potential to strengthen IKSs' incorporation into education.

Rationale for interest in or appreciation of indigenous knowledge systems

'A little knowledge is a dangerous thing', Alexander Pope (1688–1744)

Incorporating indigenous knowledge into the formal, established stock of knowledge can enrich and complete the corpus of systematised knowledge at the disposal of humanity. Further to this, Huaman (2022) lists the following reasons or rationales for exploring and incorporating indigenous knowledge: catharsis, healing-therapeutic, identity formation and self-determination. Elizabeth Sumida Huaman, writing as a scholar from an indigenous culture, writes on the relevance and value of indigenous knowledge for education and for comparative and international education as follows (Huaman 2022):

> For Indigenous and minoritized peoples in comparative and international education, we are unable to sit still or silently while fields of knowledge rearticulate themselves in ways that influence how education is shaped, too often without Indigenous voices and without our own and our communities' dreaming. (p. 394)

The exclusive claim to the established (Western-derived) canon to valid knowledge is also criticised as a factor in the suppression of and obstruction to growing autonomy by indigenous peoples (e.g. see Lomawaima 2000).

Park (2019, pp. 166–168) gives an overview of how the insider–outsider tension, that is, the problem of a mismatch between the reality perceived and conceptualised by local or indigenous-insiders and researcher-outsider can imperil the entire research exercise. This question of insider versus outsider view of research and the research subject in comparative and international education scholarly activity is complex and will be returned to in the next chapter. As a factor in research on indigenous cultures, however, it should be noted here that a single act or infringement of research conduct, for example, intrusion into a local culture or deception, can potentially invalidate an entire ethnographic study (Park 2019, p. 165). Furthermore, with external observers, there is always the risk of self-deceptions with the loss of scientific integrity (Park 2019).

The entire issue of the language landscape in the world, and of the interrelation between language and education, is, for this author, a cardinal part of the issue of the affirmation of IKSs (even though usually it is not being discussed as part of the discourse on IKSs). On the preservation and treasuring of the linguistic diversity in the world, Fishman (1982) writes:

> The entire world needs a diversity of ethnolinguistic entities for its own salvation, for its greater creativity, for the more certain solution of human problems, for the constant rehumanisation of humanity in the case of materialism, for fostering greater esthetic, intellectual, and emotional capacities for humanity as a whole, indeed, for arriving at a higher state of human functioning. (p. 1)

According to Harrison (2007 p. 3), the last speakers of probably half of all languages spoken on Earth today are alive. The Sapir-Whorf hypothesis contends that the way people think, perceive and view the world and reconstruct the world are determined by the language they speak (see Hussein 2012).

Richard E Nisbett (2003), in his book titled *The Geography of Thought: How Asians and Westerners Think Differently... And Why*, reports on his empirical research on how Asian and Western students learn (process information) and shows how their respective, hugely diverging ways of perception, processing information and learning have been shaped by their respective cultural (geographical, historical, and other) backgrounds. In the concluding chapter, Nisbett writes about the possibilities of enriching existing ways of knowledge construction by inputs from the cultural heritage and resources of other cultural groupings.

■ Assessment parameters and assignment

To return to the dictum of comparative and international education as to the contextual contingency of anything pertaining to education, it cannot be denied that the crafting of knowledge structures is also affected and limited by context (spatially as well as temporally) as a shaping factor. Therefore, the existing corpus of scholarly knowledge should constantly be tested in new contexts, refined, complemented, completed and renewed by new contexts. The existing corpus of knowledge should also be enriched by knowledge derived from other contexts.

At the same time, a number of caveats and words of caution should be mentioned. Firstly, all knowledge which had its origin in Western society and which has been brought to the fore cannot be summarily discarded. At the risk of being accused of being biased, all new knowledge should also first be validated or verified by the scientific method.

The author admits that the problem of the nature of truth: objective truth (the contention that there is something such as objective truth outside the experience of human beings) versus relational truth (the belief that truth is always subjectively coloured, because people talk and think out of their own personalities, situations or contexts, backgrounds, experiences and personal preferences) (see Du Toit 2020, p. 16) is a difficult question. Bringing both into one schema (for this author, the holy grail) is a feat as yet not accomplished. The dispute as to objective versus subjective knowledge reaches right back to the foundation stages of Western philosophy, with Socrates, Plato and Aristotle in the camp of the former (although they posited three different sources of such knowledge) and Protagoras in the camp of the latter.

What can be cited here, illustrating the two points of not discarding everything Western in origin and the need to put what is proclaimed as new knowledge through the test of scientific corroboration, is what has become known as the Sokal Hoax (see Hilgartner 1997). In 1996, physics professor Alan Sokal submitted an article in which he proposed that laws of quantum gravity are nothing but a linguistic or cultural construct to a leading journal of cultural studies. The article was deliberately liberally spiced with false statements. The intention of the author was to test the rigour of the journal and the ease with which such a journal will publish submissions, which resonates with the beliefs of the editors. After publication, Sokal, in a publication in another journal, exposed his exercise as a hoax.

In a retort to the postmodern movement that came into the field of comparative and international education in about 1990, and which Val Rust lauded in his 1991 CIES presidential address on the topic 'Postmodernism and Its Implications for Comparative Education' (see ch. 1), leading comparative education scholar (himself a former CIES president and also president of the WCCES), Erwin Epstein (Loyola University, Chicago) and co-author Katherine Carroll, published a paper entitled 'Abusing Ancestors: Historical Functionalism and the Postmodern Deviation in Comparative Education', in the *Comparative Education Review* (Epstein & Carroll 2005). To illustrate his point, Epstein and Caroll reach back to Sokal, quoting Sokal, where Sokal invites anyone maintaining that the law of gravity is merely a cultural convention or social construct to put their money where their mouth is by jumping out of the window of his (Sokal's) apartment, and they add that Sokal lived in an apartment on the 21st floor (Epstein & Carroll 2005, p. 86). Therefore, the insistence that every piece of knowledge that is Western in origin should not summarily be discarded or made suspicious, and similarly, that anything claiming to be new knowledge should be put through the mills of the scientific method for validation.

The second proviso this author wants to include, and connected to the thesis of this book, is that when it comes to the interpretation of an application of IKSs, the Creed of Human Rights and the Global Commons once again set the perimeter. The article Epstein and Carroll mentioned earlier, in which the two authors caution against the dangers of letting loose indiscriminate, boundless postmodernism in the field of comparative and international education, commences with the quote: 'If all values are relative, then cannibalism is a matter of taste' (Epstein & Carroll 2005, p. 62).

To this can be added all excesses and aberrations distasteful: child pornography, infanticide, slave trade, public executions, etc. This author takes the point made by Huaman (cited earlier) that bringing indigenous knowledge treasures into the arena of knowledge production is an exercise aiming at yielding dividends of self-esteem, identity formation and catharsis. However, such knowledge of, for example, indigenous judicial systems and penology, political organisation, etc., should be circumscribed by the Creed of Human Rights and the Global Commons.

Conclusion

Thus, the IKS lobby has risen to prominence among the comparative and international education scholarly community. This call for an appreciation of IKSs both in education in general and in comparative and international education in particular is one of the tenets which the author proposes to subsume under the construct 'criticism against Northern hegemony' as the major feature of the field at present. Inigenous knowledge systems have the potential to enrich the field and its stock of knowledge. However, such enrichment cannot come at the price of a total discarding of all existing knowledge. Such new knowledge should further also be verified by means of the time-tested scientific method. And the Creed of Human Rights and the Global Commons draw a clear perimeter as to how such knowledge can be put to the use of furthering the noble goals of the field (as explained in ch. 1). An Oxford Don, but for someone born in Africa and having spent the first years of his life in Africa (Zambia), it strikes as an anomaly that he summarises the history of 20th-century philosophy as consisting of two camps, a British-American analytical school and a (European) continental school.

Chapter 9

Unequal scholarly playing fields

Abstract

This chapter unpacks the final strand of the construct of criticism against Northern hegemony in the field. This strand is the criticism pertaining to the unequal playing field in which comparative and international education scholars in the Global South find themselves compared to their counterparts in the Global North. Aspects of this inequality are:

- authors and authorship patterns in the corpus of literature in the field
- geographic research foci in the field
- thematic research foci in the field
- geographic levels foci of publications
- the selections of units for comparison
- the entire construction of the field by the research community
- theories and theoretical frameworks extant in the field
- metrics and measuring instruments used in the field
- regimens of ethics accepted in the field
- research infrastructure at the disposal of scholars
- contextual impediments
- Northern dominance of funding sources and patterns
- publication fora for dissemination of research output.

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Introduction

The final strand of the construct of criticism against Northern hegemony is the rising voice of criticism audible in the global comparative and international education scholarly community (as well as in other scholarly fields) that scholars in the Global South are finding themselves in a very disadvantaged situation (particularly compared to their colleagues in the Global North) (e.g. see De Gayardon 2022; Mweru 2010). This inequality is evident in the following:

- Authors and authorship patterns in the corpus of literature in the field
- Geographic research foci in the field
- Thematic research foci in the field
- Geographic levels foci of publications and the entire construction of the field by the research community
- Selections of units for comparison
- Theories and theoretical frameworks extant in the field
- Metrics and measuring instruments used in the field
- Regimens of ethics accepted in the field
- Research infrastructure at the disposal of scholars
- Contextual impediments
- Northern dominance of funding sources and patterns
- Publication fora and dissemination.

These facets of inequality will be discussed in the following sections.

Authors and authorship patterns in the corpus of literature in the field

Authorship in scholarly publications in fields of education is strongly dominated by authors from the Global North. Analysing all articles published in all 2012 issues of all 219 Thomson Reuters indexed journals in education, Wolhuter (2017) found an author pool totalling 18,523 authors. Concerning their national provenance, extremely uneven patterns emerged. It was found that nearly half of all the countries on Earth did not have as much as a single author in this total pool of 18,523 authors. Almost 90% of the authors were in the North American and Western European primary node and the weaker Asian-Pacific secondary node of the global network of education scholars.

In line with authorship patterns in scholarly publications in general and in fields of education in particular (see Wolhuter 2017), authorship of the corpus of literature on comparative and international education is heavily skewed towards the Global North. This lopsided pattern of authorship has, for at least 40 years, been the object of criticism by leading theoreticians in the field. In a much-cited publication entitled 'Servitude of the Mind? Education, Dependency and Neo-colonialism', Philip Altbach (former editor of the *Comparative Education Review* and former CIES president) as long ago as 1982 expressed concern about Northern hemispheric dominance in the production of comparative and international education literature (Altbach 1982), while with respect to the top journal of the field, *Comparative Education Review*, editor Erwin Epstein, in an editorial comment in 1997, voiced a similar concern (Epstein 1997).

A further imbalance within this imbalance is the dominance of authors from the anglophone world, compared to, for example, the hispanophone, francophone, lusophone, slavophone and arabophone world, not to mention authors from linguistic spheres further from the Western core language realms (e.g. see Kelly, Altbach & Arnove 1982, p. 518; Wolhuter 2008, pp. 331–332; Wolhuter, Espinoza & McGinn 2024).

To fall back on the fundamental aphorism of the field (as explained in ch. 1), namely that of the shaping influence of context on anything pertaining to education and, therefore, by implication, also on the perceptions, structures of meaning and theoretical frameworks of people crafting a scholarly field, such a skewed pattern of authorship will result in an equally skewed corpus of knowledge produced in the field.

A final note on Northern hemispheric insensitivity to their dominance or strong occupation of publication space to the marginalisation or exclusion of the Global South, Philip Altbach, a leading scholar in the field, known for his progressive views of many issues of education and comparative education (earlier in this chapter as well as in ch. 2, his publication on neocolonialism in comparative and international education, a landmark publication in the field, was mentioned) together with Hans de Wit, has published an article. In that article, they sharply criticised what they regard as the overproduction of scholarly literature (Altbach & De `Wit 2018). These two scholars took issue with the estimated 30,000 scholarly journals in circulation, publishing between them close to 2 million articles each year. They also took issue with the huge backlogs existing at many journals at times when universities worldwide pressurise their faculties to publish as much as possible. Yet, while complaining about too much publication space, they state nothing about the disproportionally poor representation of authors from the Global South in this space, which these authors, by implication of their views on too much publication space, want to contract even more. It should be mentioned that this publication by Altbach and De Wit attracted a strong rebuke from Lee and Maldonado-Maldonado (2018), who, in their retort to Altbach and De Wit, argue for more diversity, specifically for allowing more space to authors from the Global South, in the gamut of publication fora in the scholarly world.

Geographic research foci in the field

Historically, the geographic research foci in the field showed an unbalanced focus on the Global North, although this focus has been diluted over time and can even be said to have been wiped out. In an analysis of the geographic location of the content of articles published in the top journal in the field, *Comparative Education Review*, over its first five decades of publication, the top countries in rank order of frequency of focus of articles for each five-year cycle were tabled (Wolhuter 2008, pp. 331–332). In the first five years of the existence of the review, 1957–1961, five of the top ten countries were from the Global North. In the last five years of this period, 2002–2006, this dropped to five out of the top ten (Wolhuter 2008, pp. 331–332). These findings tie in with the findings of research into trends in the geographic foci of scholarship in the field. Bjorn Nordtveit (2015, n.p.) compared the research foci of articles in the first issues of the *Comparative Education Review* (late 1960s) with patterns of research foci evident in the extensive comparative education bibliographies published in the *Comparative Education Review* in the mid-2010s and found a 'dramatic shift from the developed world' towards the developing world. Thus, the Global North's dominance in terms of geographic foci of publications has diminished and can even be said to have been obliterated – in fact, it can even be argued that it is lopsided in favour of the Global South. To belabour this point, it can be argued that the reduced space occupied by publications focusing on the Global North is reducing the opportunity for students and scholars in the Global South to become acquainted with education developments in the Global North, such as the impact of the European Union on education, or the No Child Left Behind policy in the USA. But to return to the growing space occupied by publications focusing on the Global South, these statistics should not be seen in isolation. In the previous section, the overwhelming dominance of Northern scholars as authors of publications was noted. The situation is that a substantial part of articles focusing on the Global South have been authored by scholars from the Global North. This has been borne out by an analysis of this theme (authorship-geographic focus relation) by Biraimah (2006).

It means that a large number of publications focusing on the Global South are authored by authors from the Global North. In other fields of scholarship, this treatment of the Global South as a research field has been sharply criticised, for example, in anthropology (see Gupta & Ferguson 1997). Such a pattern, bringing echoes of colonialism, patronisation and Edward Said's Orientalism (in which Said accuses Westerners of viewing and depicting Asia as something eccentric and amusing, but at the same time with underlying sentiments of contempt; Said 1978). Writing as a scholar based in and schooled in the Global North but with considerable work done in the Global South, University of Glasgow comparative and international education scholar Michelle Schweisfurth (2020, p. 90) casts a negative verdict on the field of comparative and international education, as she writes that as in colonial times, in post-colonial times the field still is dominated by Western-, Euro- and North American centricity that have resulted in contexts outside these regions being poorly understood. On this topic, with human rights education being a centrepiece of this volume, what is missing is a decolonising take on human rights education, a need to examine human rights issues through a critical lens that interrogates the Eurocentric grounding of human rights education, a need to critically explore and to interrogate human rights education in such a way that Western-derived knowledge, which is taken as universal, be problematised and that a new edifice of knowledge, re-contextualising human rights education such that it is also based on Global South contexts. Zembylas (2017) asks for an alternative configuration of human rights education that will create openings for pedagogical praxis along social justice lines. In the previous chapter, a discussion on the problem of an insider versus outsider perspective was presented. It was explained why an insider perspective, offered by a researcher with a first-hand acquaintance of the sociocultural context in which the research subjects live, holds advantages that an outsider research perspective can never have.

While the author subscribes to that argument, and while the large proportion of comparative and international education publications with the Global South as research focus but with Global North authors are indeed objectionable, at the same time, an outsider perspective also offers something new and of potential value. To rule out any outside perspective or researcher involvement would go against the grain of the entire history of the field of comparative and international education – its claims of learning from foreign experience, of global solidarity and of fostering a global mindset or international co-operation. Some of the most eminent scholars in the field have for a long time, even for most of their active lives, laboured outside their countries of birth or origin. Scholars coming to mind here include Jullien (founding father of the field, cf. ch. 1, who was French by nationality but who worked in Switzerland) and also all three of the 'triumvirate' or 'big three' of the field, namely, Isaac Kandel (Romanian by birth, professional life in the USA), Nicholas Hans (Russian by birth, professional life in the USA) and Friedrich Schneider (German, spent part of his professional life in Austria). The same can be stated about some of the leading figures in the field of a later date: George Bereday, comparative and international education professor at Columbia University and one of the early editors of the *Comparative Education Review* and one of the leading scholars in the field in the 1960s, was Polish by birth. The presence of leading scholars in the field at institutions outside their countries of origin continues to this day. Leading scholar in the field Mark Bray, of the University of Hong Kong, was not only a comparative and international education professor at the University of Hong Kong but also dean of the Faculty of Education and founding director of the Centre of Comparative Education Research at the University of Hong Kong (one of the most prolific producers of comparative and international education scholarly books the past three decades) and also (the only scholar thus far who can boast) chairperson/president of four comparative and international education professional societies (the Comparative Education Society of Hong Kong, the Comparative Education Society of Asia, the CIES, and the WCCES) is British by birth and has spent many years in various countries in Africa, Papua New Guinea and Paris. The insider versus the outsider view in the field, with contributions commending the value of an outsider perspective, was the theme of a special issue of the journal *Comparative Education* (vol. 56, no. 1) in 2020.

Geographic levels foci of publications and the entire construction of the field by the research community

The Bray and Thomas Cube, as a key analytical framework in the field of comparative and international education, has been explained in Chapter 1. It was also explained, in Chapter 1, that scholars in the field concentrate on the level of the nation-state and that even scholars known in the field as very progressive, such as Stanford's Martin Carnoy, defend this state of affairs. Of the research that does take place at levels other than the nation-state, there is a further imbalance in that higher-level studies (global, continental and supra-national levels) grossly outweigh lower-level (sub-national, institutional, classroom and individual level) studies (see Wolhuter 2008, p. 325; Wolhuter et al. 2023a). The current neglect of lower-level geographical analyses (compared to analysis at higher geographical levels) has been argued to work disproportionally to the disadvantage of the Global South. Payal Shah (2015) draws attention to the significance of micro-studies and participatory research in allowing space for the downtrodden and the marginalised groups in society. Connecting to the earlier mentioned criticism of Michelle Schweisfurth about Northern dominance, it can be argued that sections of the field, such as theories of learning, pedagogies and education planning, are more predicated on knowledge derived from research at higher geographic levels (global and supra-national) than on knowledge derived from lower geographic levels, finer textured analysis of education embedded in societal contexts. It is at the global level where the organs of Northern dominance, such as the World Bank, operate. Therefore, this imbalance, the neglect of sub-national level studies, strengthens Northern dominance (Wolhuter et al. 2023a).

The Bray and Thomas Cube has become a central reference point in the scholarly discourse in comparative and international education when conceptualising and discussing context. In a critical reflection and comment on the Bray and Thomas Cube, entitled 'Exploding the Cube', Sobe and Kowalczyk (2014) argue that the Cube fosters Northern hegemony in the way that larger geographical levels are placed at the top, suggesting the primacy of global forces (where the steering role of the North is most evident). In Chapter 4, it was explained that there are in any case other conceptualisations of the phenomenon of globalisation, which grant national or local level located forces more agencies. These conceptualisations make the primacy of the global or world-geography level, as appearing in the Bray and Thomas Cube, seem even more out of place.

The selections of units for comparison

It should be mentioned that the overwhelming percentage of studies published in the field of comparative and international education are single unit studies, that these studies qualify as comparative and international education (despite the absence of explicit comparison in any single unit study) and that such research is not without merit (see Wolhuter 2008, p. 326). However, in so far as explicit comparative studies are published, most are either North–North or North–South comparisons; South–South comparisons are very rare (see Wolhuter 2008).

Theories and theoretical frameworks extant in the field

A major publication of the 2010s on the state of the field, Maria Manzon's (2011) *Comparative Education: The Construction of a Field*, based on a doctoral thesis with Mark Bray as supervisor, is predicated on the view that comparative and international education, like any field of scholarship, is socially constructed. In this regard, Manzon draws on the views of Michel Foucault. If this can be accepted, then the Northern location of the overwhelming majority of scholars active in the field will unavoidably have a bearing on the theories used for research in the field.

Thematic research foci in the field

In Chapter 1, the 'black box' character of the field of comparative and international education has been explained and identified as one of the challenges besetting the field. To recapitulate, scholars have given more attention to the societal context shaping education systems than to what is taking place within education systems. The (societal) outcomes of education (systems) have also been grossly neglected. It can also be argued that this unbalanced focus of research works disproportionally to the disadvantage of the Global South. In terms of functionality (internal and external, the former referring to the quality of teaching and learning and attrition levels; the latter referring to societal outcomes of education, such as the absorption of graduates into the labour market), the education systems of the Global North is at a much better level than the education systems of the Global South. Hence, scholars in the Global North have the relative luxury of being better able to afford a neglect of what is taking place in institutions and systems of education, more so than their counterparts in the Global South.

Important (from the point of view of education) Global South contextual features are ignored or at least marginalised because of the Global North context-induced choice of thematic foci in comparative and international education research. Two will be pointed out here. The first is the informal economy, the size of which in the Global South is explained in Chapter 10. The second is the presence and importance of informal housing. Seventy per cent of housing in developing countries is made up of informal structures (Agarwala & Javaid 2013).

Epistemology

With increasing regularity, publications appear in the stock of comparative and international education literature, in which scholars take issue with Western-based or derived epistemology counting as the only valid epistemology. A recent example is Akiko Hayashi’s (2021) article outlining how Japanese scholars do research in the field, drawing on Japanese cultural-scientific-epistemological heritage. Hayashi’s argument builds onto another article by leading scholar in the field Jeremy Rappleye (2020), entitled ‘In favor of Japanese-ness’. In this article, Rappleye (2020) points out that, from their own cultural base, in conducting research, Japanese researchers tend to – compared to Western scholars – give more attention to caring for [*daijini*] and not being wasteful [*mottenai*] with data, taking a long perspective [*nagaime*], and focusing more on collectivities [*shuudan-sei*] and contexts [*kanjin shugi*] than on an individual actor. With publications such as these pointing out the potential of epistemologies drawing on the Japanese cultural heritage and context, enriching comparative and international education, it can rightfully be asked how much potential in epistemological resources lies untapped in Global South cultures and contexts.

Regimen of ethics

There is also a need for a Global South contextually tuned or sensitive regimen of ethics, as the current Northern hemispheric context-derived regimens of ethics are often detrimental to the interests of both research subjects and scholars in the Global South (Mapitsa & Ngwato 2020).

Research infrastructure at the disposal of scholars

Institutions in the Global North are, as a rule, better endowed in terms of financing and infrastructure than institutions in the Global South. The best libraries and laboratories are invariably located in the Global North. Buildings at universities in the Global South are often decrepit and badly in need of maintenance. Staff housing, academic salaries and fringe benefits to academics in the Global North cannot be compared to those of their colleagues in the Global South. All of these place scholars labouring in the Global South in a very disadvantaged position *vis-à-vis* their colleagues in the Global North.

Contextual impediments

Global South scholars find themselves in contexts – politically, economically and otherwise – that are generally much more uncongenial to the conduct of research than those in the Global North. It should be added here that not all of this can be ascribed to Northern hegemony. The undiluted truth should be faced that many of these problems can be laid before the Global South. Many governments are there in the Global South; they are unable to perform core functions of central governments (such as maintaining the integrity of the borders of the state, securing the lives and property of its citizens, and ensuring the rule of law) but are overregulating needlessly on minor issues to the point of choking the economy and stifling the autonomy, initiative and agency of civic society. Problems such as nepotism, cronyism, appointment of competent and non-dedicated staff, corruption and other aberrations contribute to such state decay. This problem has often been pointed out by scholars and by commentators in the public discourse, in the Global South at large and Africa in particular. For example, for all the rhetoric of African solidarity and 'Africa is one', and the existence of an African Unity (and its predecessor, the Organisation for African Unity) for over 60 years, internal borders in Africa are notoriously clogged and difficult to negotiate. At the time of writing, heavy-duty road vehicles carrying the exports of not only South Africa but also a host of neighbouring countries from South Africa to the Mozambique port of Maputo are piled for 40 km at the Komatipoort border post between South Africa and Mozambique (Mbele 2023, p. 9). This government decay also spills over into education, including the management and administration of top universities, as has been demonstrated by research. For example, Harding's (2020, 2023) doctoral research found how institutional decay at South Africa's largest university, which included maladministration, a culture of bullying, victimisation and intimidation, dubious decisions at the management level and poor communication resulted in institutional paralysis at that institution.

Northern dominance of funding sources and patterns

In the most recent presidential address of the BAICE, Mario Novelli (2023) argues that the Northern dominance of funding sources and patterns in the field inescapably implicates and limits Global South scholars in the field.

Internationalisation patterns of universities in the Global South also still clearly reflect Northern dominance. Heleta and Jithoo (2023), for example, analysing research collaboration between South African researchers and researchers abroad for a ten-year period (2012–2021) clearly shows that despite official (at government and institutional levels) prioritisation of collaboration and internationalisation with Global South partners, such internationalisation and collaboration are still dominated by collaboration with Global North researchers and institutions.

Publication fora and dissemination of research

Scholars from the Global South who focus on the local context tend to have the added disadvantage of being at the mercy of anonymous reviewers who are mostly drawn from the Global North and who not only may, in all likelihood, be unfamiliar with those contexts but will also assess manuscripts from their own subjective sense of which themes, data, methods and locations are important (Lee & Maldonado-Maldonado 2018). Then, these researchers from the Global South are forced to publish in English or another language which is not their first language. The four top journals in the field of comparative and international education, the *Comparative Education Review*, *Comparative Education*, *Compare: A Journal of Comparative and International Education* and the *International Journal of Education Development* are all unilingually English (i.e. publish articles only in English). The same can be said about the *Oxford Review of Education* and the *Harvard Education Review* (both not exclusively comparative and international education journals, but they are preferred publication fora of top scholars in the field).

Strielkowski and Chigisheva (2018) argue that the global publication market is prejudiced to the advantage of the historical centre and established researchers and institutions. Encouragingly for the objective pursued by this book, these authors also show how scholars in nations such as Russia and China are making headway against this (Strielkowsky & Chigisheva 2018). An experiment done and published in 1982 by Stephen Ceci and Douhlas Peters, two psychologists from the USA, provides empirical proof as to how the Matthew effect operates in academia, to the detriment of scholars outside of established (i.e. Global North) citadels. Ceci and Peters selected thirteen articles that were published in top journals of psychology shortly before they commenced their experiment. Each of these articles had been authored by an academic affiliated to one of the top universities in the USA (such as Harvard, Yale and Stanford). It should be noted that (Strielkowski & Chigisheva 2018):

> Subsequently, they changed the names [*and affiliations*] of authors as well as titles of papers and re-submitted them to the same top psychological journals [...] Only three papers were detected while the [*others*] were peer-reviewed and rejected by the [*very*] same journals that published them recently (Ceci & Peters 1982). (n.p.)

Conclusion

For the affirmation of the Global South in comparative and international education and of scholars of comparative and international education in the Global South in particular, the equalisation of the scholarly playing field is a *sine qua non*. This equalisation entails first of all the eradication of Northern dominance in the authorship pool in comparative and international education publications. It is especially a large number of publications with the Global South as the research focus but with authors of Northern provenance that is objectionable. The field's research agenda, namely, the predilection for themes pertaining to the societal contextual shaping forces of education and the marginalisation of the societal outcomes of education systems and especially the neglect of that which takes place within education systems, also disproportionally disadvantages the power of the field in the Global South. A case can also be made that privileging larger geographical levels of analysis, both in terms of research preference and the depiction of the field (at least as portrayed by the Bray and Thomas Cube), is favouring the Global North. The existing location of publication (publishing houses and journals) and their policies regarding the language of publication contribute to creating an unequal playing field that is tilted against scholars and students in the Global South.

Chapter 10

The rise of the Global South on the global scene

Abstract

In contrast to the objectionable, marginalised position of the Global South and scholars from the Global South in comparative and international education, the societal context of the Global South as a mega-region in the world is assuming significance and growing stature in the world. This chapter surveys the rising stature of the Global South. Geographically, the Global South covers a large tract of land and contains a considerable part of the global natural resources and global ecosystems. Demographically, the densist portion of the earth's population has shifted to the South, and by the best of projections, an increasing percentage will inhabit the Global South in the coming years and decades. Economically, the Global South has been rising in strength during recent decades. Arguments have been forwarded that the Global South is assuming the vanguard position regarding global sociocultural dynamics or trends. The growing demographic and economic weight lend more political clout to the Global South in the world, while the rise of a multipower world, with Russia and especially China seeking a stronger role in the world, also enters a new global geopolitical calculus, attaching new value to the Global South. This rising stature of the Global South is surveyed in this chapter, making the case for a reconstructed comparative and international education all the more compelling.

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Introduction

In glaring contrast to the position of the Global South and scholars in the Global South in the scholarly pursuit of comparative and international education stands the promise of the rise of the Global South in the contemporary world. Using the conventional schema of societal contextual analysis, which has gained currency in the field of comparative and international education since the 'Factors and Forces' stage of the pre-Second World War decades of the 20th century (as was explained in ch. 1), this chapter will depict the towering and growing stature that the Global South is assuming in the present world – geographically, demographically, economically, politically, socioculturally and also as far as religion and philosophy of life and world are concerned. But before doing so, the concept of the Global South, which has been used throughout this book, needs to be clarified.

Global South: Conceptual clarification

The term 'Global South' was invented by Carl Oglesby (1935–2011) in 1969 (Oglesby 1969). The exact borders are difficult to draw; the term refers broadly to Latin America, Africa, Turkey, the Middle East and Asia (excluding Russia and the high-income Asian countries or jurisdictions, such as Singapore, South Korea, Japan, Hong Kong and Taiwan).

While the Global South certainly has a geographic expression with its heartland as demarcated by Oglesby, this demarcation has to be expanded in order to be adapted to current contextual realities (Wolhuter, Espinoza & McGinn 2024). As Lewis et al. (2015, pp. 550–560) have argued, in the field of comparative and international education, the notion of space should be reconceptualised as being described and circumscribed by relations or connections rather than only physical space. In this chapter and this book, the author uses this conceptualisation of space when demarcating the Global South. It is not only physical connections that are important, as Oxford comparativist Colin Brock (2016) argued in his last publication before his death. The exigencies and the reality of the contemporary era mean that scholars of comparative and international education should adapt their notion of space of geography as a shaping force of education to include the notion of cyberspace and as an additional attribute of education systems and of the context shaping education systems. In addition to this, acknowledgement should also be given to genealogical connections (in the self-definition of people and communities or the way their identities are constructed by others) (Wilson 1994; see also Otele 2019). Thus, while a Global South heartland can be shown on a world map, it is a rather elastic, unfixed and not a definite term. Global North–South is therefore no simple, clear-cut binary or dichotomy, but complex and complicated by issues of hybridity and fluidity. The notion of no clear-cut binary of black and white should also be questioned; that is, there is no pure Global North and pure Global South only, but an infinite range of shades of grey in between. Perhaps Global North and Global South should rather be viewed as ideal types in the Max Weber sense (see Weber 1949) than territorial units mutually exclusive and as territorial units totally fitting or matching the notions of Global North and Global South.

As such the usage of the term, not so much to indicate a contagious uniform territory with fixed borders, fits into the scholarly field of geography's modern-day (past 50 years) predilection to work with functional or nodal regions (Abler, Adams & Gould 1971). It also ties in with a trend in historiography to make relations between geographic regions rather than regions the focal point of history writing (e.g. see Fankopan 2015). It also fits in with the interest in diaspora studies in the field, especially diaspora of Global South people. This is evident in, for example, the existence of The African Diaspora SIG of the CIES. This SIG aims to cultivate a group of researchers and practitioners of black communities all over the world. A more comprehensive study of the education situation of people of African descent inside as well as beyond the USA presents the possibility to identify similar and different challenges to extract lessons and to spot new possibilities (African Diaspora SIG & CIES 2022). Another indication of diaspora studies being in the vogue is the existence of the journal *Diaspora, Indigenous, and Minority Education*, in existence since 2007, and a sought-after publication forum by scholars in the field. The journal publishes four issues annually. Current editor is Bruce Collet, comparative and international education professor at Bowling Green University in the USA.

Global South is frequently mentioned today in social science scholarship. However, in comparative and international education publications, it has not yet been frequently used explicitly (see Wolhuter et al. 2023).

Geography

In social science scholarship, there is a rich history – though today largely discredited – depicting geography as determining the destiny of people and of societies. Examples include Halford Mackinder's Heartland Theory (Mackinder 1904), Els and Frederick Jackson Turner's essay on the influence of the frontier on the American national character (Turner 1893) (a term that sounds a familiar, if problematic and largely discredited, tone in the field of comparative and international education, being a threshold concept in the scheme of Isaac Kandel, see ch. 1) and Ellsworth Huntington's (1915) climate determinism. Conventionally, textbooks of Political Geography (e.g. Pounds 1963) identify geography (size of a country, location, shape, natural assets) as one of the elements of national power of a state. The most recent addition to this literature is the publication by Peter Frankopan (2023), namely, *The Earth Transformed*.

There is a school of thought denigrating the role of geography in national power in the contemporary world. Thomas Friedman (1992, 2009) typifies the present world as a 'flat world', that is, where globalisation, especially the information, communications and transport revolution, has levelled out the advantages geography has provided a country; national power has become more and more a function of the level of human resource development. One outcome of this is that education has assumed the status of a commodity of fierce competition between countries in a globalised world (see Carnoy 2016; Russell Group 2010). While there is certainly truth in the argument of Friedman as to the relative rise of education and human resources compared to geography as a factor of national power, the importance of, for example, fresh water as a resource, and the increasing scarcity thereof, and even arguments that if a next World War will erupt in the current century, it will be for water (see Werft 2016), mean that geography has by no means become null and void. In a stream of publications, geographers Tim Marshall (2015, 2021) and Jared Diamond (2005) argue that geography remains a powerful factor in shaping national and world political events. Diamond (2005) argues that the successes and failures of past (and present) societies have been based primarily not so much on cultural factors, as on ecology. Frankopan (2023) accords to geography, then specifically ecology, a pivotal place in contemporary global politics.

Before illustrating the geographic strength of the Global South, it should be mentioned that one of the problems working with the Global South as a category is the difficulty in finding aggregate data (in order to compare and to contrast the Global South with the Global North) (cf. De Baston & Mukku 2020). The World Bank and UNESCO do not publish aggregate data on the Global South. However, an indication of the geographic weight of the Global South can be obtained from World Bank data on the surface area of the high-income countries and that of the low- and middle-income countries. This division corresponds roughly with the Global North–Global South divide. The combined surface area of the high-income countries is 35.2 million square kilometres (World Bank 2022a). That of the Global South is 93.9 million square kilometres (World Bank 2022a). Furthermore, a large part of the natural resources of the earth are found in the Global South. These include natural forests, biodiversity, mineral deposits and freshwater resources. The ten largest rivers (by discharge) in the world are all in the Global South (cf. Wright 2022).

It should also be mentioned – and this strengthens the argument of the unequal playing field explained in the previous chapter – that the most often used projection used in world map, the cylindrical Mercator Projection (designed by Flemish scholar Gerardus Mercator and dating from 1569, at the time of the European conquest of the extra-European world), presents a grossly distorted view of the world, in so far as that regions far from the equator are exaggerated: the further the distance from the equator, the bigger the exaggeration. With the Southern continents lying closer to the equator, and by comparison the Northern continents lying closer to the poles, this projection makes the Northern continents appear much larger (*vis-à-vis* the South) than they are. For example, the Mercator Projection makes North America appear larger than Africa, whereas in reality Africa (30.37 M square kilometres) is one-fifth larger than North America (24.71 M square kilometres).

Demography

Demographically, the Global South is assuming ever-growing proportions in the world. As is, currently only 17% of the global population reside in developed countries (Wang 2018).

The total number of people in the high-income countries (roughly the Global North) compared to the middle- and low-income countries (roughly the Global South) is presented in Table 10.1.

The Global South as growing factor in the global population pool is evident from comparing population growth rates in various parts of the world. Currently (2022, latest available figure), the global population increase at a rate of 0.84% per year (this figure is declining; in 2020, this figure was 1.05%) (Worldometers 2023). For Europe and North America (roughly the Global North), the figures are respectively 0.06% and 0.62%. For Latin America and the Caribbean, Asia and Africa (roughly the Global South), the corresponding figures are, respectively, 0.09%, 0.86% and 2.49% (for the sake of completion, the rate of Oceania, which straddles the Global North and the Global South, stands at 1.31%) (Worldometers 2023).

Ninety-nine per cent of the annual global population growth takes place in the developing countries. An indication of the growing demographic factor that the Global South constitutes in the world can be gleaned by a

TABLE 10.1: Population in high-income countries versus middle- and low-income countries.

Taxon	Total population (2021) in millions
High-income countries	1240
Middle- and low-income countries	6619

Source: World Bank (2022b).

comparison between the population of Europe and Africa. In 1950, Africa's population of 230 million was half that of Europe; by 1985, it drew level (at about 480 million each); by 2025, it is predicted that Africa's population will be three times that of Europe (Kennedy 1993, p. 25). In 1950, Africa had 9% of the global population, and this rose to 15% in 2010 as Africa's population broke through the 1 billion mark (Mills 2021, p. 88). It is projected that Africa's population will continue to grow at its spectacular rate to 2.2 billion, containing one-quarter of the global population (Mills 2021). Mali's population is predicted to more than double in one generation, from 18 million in 2018 to 44 million in 2050 (Mills 2021, p. 201). Pakistan's population increase from 143 million in 2000 to 216 million (2020 figure) in just 20 years (Mills 2021, p. 221).

When considering demography it is not only totals (total number of people) and growth rates that need to be considered. Two other important aspects of demography are the age pyramid and mobility. From the point of view of education, the youthful profile and the numbers of children and young people in the Global South (and the percentage of the global young population who are in the Global South) are pivotal. An indication of the differential age pyramid can be gleaned from the median age of the population on each continent. In Europe and North America (corresponding roughly to the Global North), the median ages are, respectively, 42 and 35 years (Desjardins 2019). In Asia, Latin America and Africa (roughly the Global South), the corresponding figures are, respectively, 31, 31 and 18 (Desjardins 2019).[9]

The current global demographic picture is one of an increasingly mobile population. It should be borne in mind that population mobility, the migrations of peoples, has been argued to be a strong factor in shaping history and the well-being of societies. Sonia Shah (2020) portrays migrations not as a threat or destructive force in shaping history, societies and cultures, but as a positive, benevolent or benign factor. Such a view stands at odds with the counter trend of closing or inward turning of societies noted in Chapter 4. The Brookings Institute found in research in 2017 that there is a positive correlation and a causal link between immigration and economic growth (Leon 2022, p. 6). It found that while immigrants make up 15% of the workforce of the USA, they account for about a quarter of the investors in the USA (Leon 2022). Such a positive view of immigration is significant and should be taken into account when considering the Global South in the contemporary world – a strong vector in global migration patterns is from the Global South to the Global North.

9. In the interest of completion, it should be mentioned that the figure is 33 for Oceania, in the world total a minuscule population, but which is straddling the Global North – Australia and New Zealand, and the Global South – Papua New Guinea and the South-West Pacific Islands.

As stated above, the current world demographic pattern is one of growing mobility. This mobility has been brought about or at least facilitated by inter alia the information, communication and transport technology revolution (Wolhuter 2022):

> The amount of international migrants globally (that is people staying in a country different from their countries of birth), totals 258 million, or 3.4 percent of the total world population (Institute National d'Etudes Demographiques 2020). This is rising at a rate of 2.4 percent per year. The countries in the world containing immigrants constituting various proportions of their population, going up to 88.4 percent in the case of the United Arab Emirates. The country with the biggest immigrant population is the United States of America with 49.8 million. The two countries being the biggest suppliers of emigrants are India and Mexico with respectively 17 million and 11 million per year. (n.p.)

Of the current global population migrations, a strong vector is the migration of people from the Global South to the Global North regions. In fact, this is lying at the base of the protrusions of the people Global South into the Global North taken into the definition of the Global South proffered at the beginning of this chapter. As these movements have profound implications for education, it is discussed in the next chapter, which deals with the rise of the Global South on the global education scene.

Economy

Notwithstanding the Global South being (roughly) called in other (some somewhat discredited) nomenclatures the developing countries, or the low- and middle-income countries, and despite the criticism of the neoliberal economic revolution being levelled by those holding a brief for the Global South (as was explained in ch. 5), large parts of the Global South have been the scene of impressive economic development since about 1990. An indication of the place of the Global South in the global economy can be gleaned from Table 10.2.

TABLE 10.2: Gross domestic product for 2021.

Region	GDP (US$)
World	96,100,091
High-income countries	59,445,423
Upper middle-income countries	27,104,280
Lower middle-income countries	8,683,293
Low-income countries	526,278
Sub-Saharan Africa	1,917,904

Source: World Bank (2022c).
Key: GDP, gross domestic product.

In Table 10.2, the economic growth rates for the various world regions in the decade 2000–2010 and for the decade 2010–2020 are presented in Table 10.3.

The figures presented in Table 10.2 create the impression of a Global South catching up with the Global North, in as far as economic output is concerned. The impressive growth rates of China and (though less so) India and their rise in the global rankings as measured by economic output alone make the Global South more and more a factor to reckon with when considering the global economy. China has surged in a short time span to become, in terms of gross domestic product (GDP), the second biggest economy in the world (after the USA), India likewise has become the sixth largest economy in the world (Trading Economics 2023). At the time of writing, the latest available annual GDP of the USA was US$23.3bn, that of China US$17.7bn and that of India US$3.2bn (Trading Economics 2023).

Unfortunately, the impressive growth spurt in the Global South, which commenced in 1990, has begun to run out of momentum after two decades. Besides the slowdown in economic growth the past approximately decade, another ominous trend is growing inequality in the world. Firstly, it has to be stated, for balance and for perspective, that the incidence of poverty has been on a declining curve the past few decades. The current poverty level of the World Bank is US$2.10 per day (2017 purchasing power parity) (World Bank 2013). Since 1990, the percentage of the global population living on less than US$2.10 per day has declined as follows: 38.8% in 1990, 29.1% in 2000, 10.8% in 2015 and 8.4% in 2019 (latest available figure at the time of writing) (World Bank 2023).

However, despite a heartening reduction in the incidence of poverty, there is, as stated, at the same time growing inequality, reaching obscene proportions and harbouring dangerous socio-political explosive potential. This growing inequality has been depicted in detail in a sequence of books written by Thomas Piketty (2014, 2020, 2022). The extent of inequality in

TABLE 10.3: Growth of gross domestic product of various world regions past two decades.

Region	Average annual growth of GDP for 2000–2010 (%)	Average annual growth of GDP for 2010–2020 (%)
World	3.2	2.7
High-income countries	2.0	1.7
Upper middle-income countries	7.0	4.7
Lower middle-income countries	5.8	4.6
Low-income countries	5.6	1.9
Sub-Saharan Africa	5.5	2.9

Source: World Bank (2022c).
Key: GDP, gross domestic product.

the world is simply but starkly portrayed on the web page (Meadows 2020, cited in Wolhuter 2022):

> If the world were a village of 100 people, then for example, only one would have a university degree, only 20 will have access to clean, drinkable water, and 59% of the wealth would be concentrated in six people (all living in the United States of America). (n.p.)

Another indication of the extent of inequality in the world, this statistic both of regional and gender inequality, is that the 22 richest men in the world have more in their estates than the combined total of all women in Africa (Herman 2020, p. 328).

As is clear from the statistics above, a glaring inequality in the world is between the Global North (being the more affluent) and the Global South (being less affluent or even challenged by being poverty-stricken). At intra-national level, inequality is more pronounced in the Global South. The conventional indicator to measure intra-national inequality is the Gini coefficient. The theoretical value of the Gini coefficient ranges from zero (indicating complete equality) and 100 (the most extreme inequality). South Africa ranks as the country with the highest level of income inequality in the world, having a Gini coefficient of 63.0. In South Africa, the richest 10% hold 71% of the wealth, while the poorest 60% hold just 7% of the wealth (World Population Review 2023). All ten countries with the highest Gini coefficient value are in the Global South (World Population Review 2023). These are South Africa (63.0), Namibia (59.1), Suriname (57.1), Sao Tome and Principe (56.3), Central African Republic (56.2), Eswatini (54.6), Mozambique (54.0), Brazil (53.4) and Belize (53.3) (World Population Review 2023). The nations of the Global North tend to be more egalitarian. Slovenia has the lowest Gini coefficient: 24.6 (World Population Review 2023). The USA has a Gini coefficient of 41.1 (World Population Review 2023).

Sociocultural situation

An interesting argument that has recently been put forward by scholars (i.e. see Wolhuter & Chigisheva 2020), including scholars in comparative and international education, such as Takayama, Sriprakash & Connell 2016), is that the Global South is currently assuming the vanguard position regarding global sociocultural dynamics or trends, marking out a road the Global North is destined to follow. Comaroff and Comaroff (2012) argued that North America and Europe in particular are now treading a path that has tracklayed by Africa – echoing remarks that has also been noted by political leaders and in the public discourse in South Africa. Linking up to a larger (historical) canvas, this argument resonates with the thesis of Martin Bernal (explained in his three volumes 1987, 1990, 1991, 2006, see also

Moore 2001) as to the Afro (Egyptian) and Asiatic roots of Western (Greco-Roman) civilisation (see also The Free Library 2023).

To belabour this last point as to the historical gravitas and significance of Africa, it is documented that in ancient times, European intellectual and cultural icons, who formed the basis of what is today conceptualised as the basis of Western or European philosophy or scholarship, actually travelled to Africa, to learn from African masters and then to return to their countries of origin to spread what they have learned in Africa. They came to Africa to learn the basics of science, mathematics and philosophy. Thales of Miletus (624–547 BC), for example, left his country to study with the wise men of Egypt. To the extent that there are merits in these theses as to the Southern vanguard position regarding global sociocultural dynamics and trends, it places scholars in the Global South very well to imbue and to enrich the theoretical edifice of education and also that of the entire gamut of social sciences, with Southern perspectives.

It is pertinent that the above statements regarding the tracklaying role of the Global South regarding global trends be zoomed in and illustrated with more concrete examples. The first example pertains to the nature of work. It has been pointed out that the nature of employment is changing worldwide. The proportion of people who have a 'job for a lifetime' is dropping, and the prevalence of contract work, fixed-term appointments, temporary work, part-time work and people working from home is increasing, as is self-employment and entrepreneurship. This has once again been highlighted by the World Bank's (2019) report entitled *The Changing Nature of Work*. In the Global South, self-employment and entrepreneurship have already moved to a prime creator of employment, albeit, within the societal ecology of the Global South, in another form, namely that of the informal economy (see Alcock 2018). The International Labour Organization (ILO) estimates that as a percentage of GDP, the contribution of the informal economy in sub-Saharan Africa is 41% (Jackson 2016). This figure varies from under 30% in South Africa to 60% in Nigeria, Tanzania and Zimbabwe. It is a major employer too. It constitutes about three-quarters of non-agricultural employment and about 72% of total employment in sub-Saharan Africa. Around 93% of new jobs created in Africa during the 1990s were in the informal economy (Jackson 2016).

Politics

The era after the conclusion of the Cold War in 1989 has often been dubbed as the era of 'Pax Americana' or the era of 'the Washington Consensus', a unipolar world with unquestioned North American hegemony. The growing demographic and economic weight of China strengthened its resolve to become a world power, visible in its launching of the ‘road and belt’ initiative or policy. Together with a more assertive Russia, there are signs of a new, immanent multipower global order. The Global South will figure as a stronger factor in the geopolitical calculus of such a new multipower global order. Not only does it seem as if one of the members of the Global South will be one of the new line of superpowers, but also these new assortment of superpowers will vie for influence over and favour of the various nations of the Global South, such nations will acquire new clout. The point is the post-Second World War era in global politics, in which the West (specifically the USA) ruled supreme is now after 80 years seemingly coming to an end. The unipolar global political order seems to be replaced in the near future by a more multipolar world, wherein the West (the USA) cannot dictate any more). This has profound implications for education, with respect to global citizenship education, the internationalisation of higher education and intercultural education.

Religion and philosophy of world and life

On religion and philosophy of world and life, Samuel Huntington (1996) delineated the religion and life and world philosophical patterns in the world after the end of the Cold War era, as consisting of the following civilisation blocs: The Western (Western Europe, North America, Australia, New Zealand), the Orthodox (Eastern Europe), Hindu, Buddhist, Confucian, Shintoist, Islam, sub-Saharan African and Latin American. Without totally underwriting this oversimplified view of the world, the Global South is the heartland of all but the Western and the Orthodox.

It should be mentioned that despite frequent claims that the current age is one of a post-religious world or society (e.g. see Du Toit 2020), religion persists to be a strong force in the lives of many people, albeit in another form and present than was the case historically (see Steyn & Wolhuter 2021, p. 18). According to Turley (2019, p. 2), 80% of the global population regard themselves as belonging to one of the major religious groupings. According to the Pew Research Center (2015), the absolute number of adherents of all the major religions in the world will increase during the years 2010–2050. Atheists, agnostics and other people who do not affiliate with any religion will make up a decreasing percentage of the world’s total population (Pew Research Center 2015). As a percentage of the global population, Christians – in terms of adherents the largest of the major religions in the world – were 31.4% in 2010 and is estimated to remain at that percentage till 2050 (Pew Research Center 2015). The absolute number of Christians in the world came to 2.17 billion in 2010, and this number is expected to rise to 2.92 billion by 2050 (Pew Research Center 2015). During the same period, Muslims as a percentage of the global population will rise from 23.2% to 29.7% – that is approaching Christianity in terms of proportion of the global population, and in terms of absolute numbers from 1.6 billion to 2.76 billion (Pew Research Center 2015).

This renders the Global South of utmost significance in the advancement of interculturalism as philosophico-moral basis for a 21st-century world.

Imperative and parameters for comparative and international education responding to the rise of the Global South on the global societal scene

In the global societal context, the stature of the Global South is rising by the day, asking for a commensurate response from the scholarly field of comparative and international education. From the survey offered in this chapter, this imperative clearly transpires, however, read with all previous chapters in this book, this response to the rising Global South should proceed within certain parameters. Given the geographic resources or riches of the Global South, ensuring sustainable development in this part of the world, and then education for sustainable development, is pivotal to the well-being and future of both the Global South and the Global North. One final parameter should be spelled out. When dealing with these realities and imperatives (for education) in the Global South, scholars of comparative and international education, while they cannot and should not pretend to be authorities on matters pertaining to each of the societal contextual sectors shaping education (economy, politics, etc.), should not shy away from pointing out, and in this regard drawing on literature from scholars in fields of social sciences such as economics or political science, contextual impediments in the way of the development of quality systems of education, which make a desired impact on society.

Conclusion

The Global South has always constituted, on the strength of its geography, a significant factor in the global equation. In recent times, its changing demography, economy and sociocultural dynamics and the current geopolitical reassembly of the world have given this part of the world ever rising levels of importance. These have clear implications for education and therefore also for comparative and international education, more so given the step-child kind of treatment meted out by the field to this part of the world (as was explained in the preceding chapter). How education in the Global South has responded to these societal imperatives will be the theme of the next chapter.

Chapter 11

The rise of the Global South in the global education expansion and reform project

Abstract

One of the signature features of the present era in the history of humanity is the global education expansion project. After having existed on the periphery of society, formal education moved to the centre of public life in the mid-20th century. A set of very high expectations as to the beneficial effect of education in the lives of individuals and in the evolution of society provided the rationale for this stellar education expansion project. In the Global South, this education expansion was even more pronounced than in the Global North. However impressive, this education expansion project leaves much to be desired and falls far short of expectations. These shortcomings are present along all three dimensions of the global education expansion project: quantitatively, qualitatively and equality-wise. This assessment, too, pertains particularly to the Global South. It is in this regard, that is, addressing the shortcomings of the global education expansion project, which are more pronounced in the Global South, that comparative and international education – after having evolved into Phase 9 of its development – can play an invaluable role.

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Introduction

This volume has commenced with a sentence at the outset of the first chapter that the current era in world history is one of an unprecedented expansion of education. One of the most impactful but simultaneously underappreciated trademark trends of the current phase in world history is the global education expansion and reform project (see Altbach, Reisberg & Rumbley 2009; Baker 2014; Epstein 2005; Meyer, Boli & Ramirez 1985). This project gained traction after the mid-20th century and is still charging ahead, with even more momentum than ever. The time after the ending of the Second World War has been typified by a number of descriptors. Firstly (in the 1950s), in the wake of developments in physics and the unpalatable events at the end of the Second World War, it was in vogue to call it the 'nuclear age' or the age of the splitting of the atom. Then, in the 1960s, in the wake of Sputnik, the space race and the moon landing, it became fashionable to talk about the 'Space Age' or the age of space travel. Later, it was frequently described first as a technological age (e.g. Kennedy 1988; Toffler 1980) and later as an age of globalisation (Friedman 1992, 2009).

But one often overlooked shift in the world has been the education revolution of the past 75 years. This revolution has been centred in two books by Philip Coombs: first his book, *The World Education Crisis: A Systems Approach* (Coombs 1968), and then his follow-up book, *The World Crisis in Education: The View from the Eighties* (Coombs 1968, 1985). University of Pennsylvania comparativist David Baker (2014) also unpacked the impact of this revolution in shaping a worldwide culture in his book *The Schooled Society: The Educational Transformation of Global Culture*. But despite the high visibility of this revolution in the world and an avalanche of publications on education in particular countries and regions and on single education issues, such panoptic studies on education and its impact on global society are very sparse.

The objective of this chapter is to survey the global education expansion and reform project and to highlight the prominent place and growing salience of the Global South in this project. The chapter opens with a brief portrayal of the historical lack of extensive development of education, which for millennia was the unquestioned status quo, and with a survey of the societal antecedents or causes of this monumental project. The global education expansion drive and the place of the Global South in this drive are then reconstructed. This expansion drive is then assessed. In the final part of the chapter, the dimensions of the global education reform drive and the place and significance of the Global South in these reforms are teased out.

The underdeveloped state of education has existed for millennia

For millennia, education, at least in the form of formal education as it is known today (at schools and universities), was absent or very poorly and sparsely developed. Over centuries, the expansion of schooling was very gradual. The first schools appeared, according to the best evidence, around 3500 BC, soon after the invention of writing (Bowen 1982, p. 8). These first schools were in Mesopotamia (Bowen 1982). By comparison, the cognitive revolution, that is, when language appeared, occurred about 70,000 years ago (Harari 2015). Then, for most of this part in which schools did exist, education existed at the fringes of society and had little effect on the lives of most people or on socioeconomic development (see Wolhuter 2019). The word 'school' has been derived from the ancient Greek word meaning 'spending of leisure time'; that is, schools were for the children of the idle rich to fill all their leisure hours, with no further significance.

Education, specifically higher education, stood isolated from the momentous developments of the 18th century, which laid the basis of the modern political order, such as the Glorious Revolution in England in 1688, the American Declaration of Independence in 1783, the subsequent development of a Bill of Human Rights and a Constitution in the USA and the French Revolution of 1789. Neither some of those who drew up the North American Constitution (such as Thomas Paine) nor the intellectual tracklayers of the French Revolution (Montesquieu, Jean-Jacques Rousseau and Voltaire) were attached to any university or underwent any higher education. How marginal schooling and education were to economic development is indicated by the fact that during the first 100 years of the First Industrial Revolution (which commenced around 1760 in England), the incidence of adult literacy in England actually declined from about one-third to about one-quarter of the adult population (Cipolla 1969, p. 1).

Even in Europe and North America, where at the time schooling was most developed, by 1800 only 5% of the population had attended any form of primary education (De Bolton 2022, p. 245). It was only in 1955 that the aggregate global adult literacy rate reached the 50% mark, that is, when the majority of adults in the world were able to read and write (Trewartha 1969, p. 173). Moreover, a glaring global divide existed at that time. Whereas in the Global North (North America and Europe, particularly Western Europe), systems of universal compulsory primary school attendance were established in the 19th century, and systems of universal (especially lower) secondary education were established during the first 50 years of the 20th century; in the Global South, even universal primary school attendance was still a long way off. Of all the regions of the Global South, it was especially in sub-Saharan Africa that education was very poorly developed, in some places and levels even totally absent. In 1960, the gross primary, secondary and higher education enrolment ratios in sub-Saharan Africa came to 45%, 5% and 1%, while the adult literacy rate was 9% (Wolhuter & Van Niekerk 2010). When Botswana attained independence in 1966, the country had only twelve university graduates and 100 people with a secondary school termination certificate (Meredith 2005).

In Chapter 1, it was stated that the social science phase in the development of comparative and international education, Phase 5, commencing in the decades after the Second World War, coincided with the launch of a spectacular global education expansion project, which is still surging ahead today. This begs the question, after centuries and millennia of being dormant: Why this sudden, frantic education expansion?

The societal antecedents of the global education expansion project

To answer the question of why the education expansion worldwide began accelerating since the mid-20th century, the time-tested method of comparative and international education (as was made clear in ch. 1) will be resorted to. That is, that education systems are the result of contextual forces and that these contextual forces can be analysed in the following categories: geography, demography, sociocultural situation, economy, politics, religion and life and world philosophy.

Geography

The current era is one of an ecological crisis, to the extent that the survival of humanity and even the planet is at stake (see Mortimer 2014; Ord 2020; Rees 2003). Constituents of this ecological crisis include atmospheric pollution and global warming, freshwater depletion and pollution, marine pollution, destruction of biodiversity and depletion of marine life, soil depletion, invasive species (no doubt the growing numbers of humans and their increasing mobility and technological prowess plays a part) and deforestation. In 2019, an international scientific panel, IPBES, endorsed by 130 governments, completed a global assessment of the earth's biodiversity and ecosystem resources. Their assessment was stark: 1 million different biological species are at threat of extinction within decades, and the situation has become worse over the last 50 years (Koekemoer 2023, p. 11) (estimations of the total number of plant and animal species on Earth range from 3 million to 10 million). In countering this ominous trend of ecological destruction, the concept of sustainable development has been formulated, and humanity has formulated the seventeen SDGs as their (humanity's) vision for the year 2030. On 25 September 2015, the General Assembly of the UN adopted Resolution 70/1, that is, ‘Transforming our world: the 2030 agenda for sustainable development’, containing seventeen SDGs to be attained by 2030 (UN 2015) (see also ch. 3).

Goal 4 of these seventeen SDGs deals explicitly with education: ‘ensuring inclusive and equitable quality education and promoting lifelong learning opportunities for all’ (UN 2015, n.p.). At a meeting called by UNESCO in Incheon, South Korea, from 19 to 21 May 2015, the Incheon Declaration was drawn up by over 1,600 delegates from 160 countries, including over 120 ministers who attended the meeting. As was explained in Chapter 3, the Incheon Declaration unpacked SDG 4 and constitutes the aim of humanity as a collective for education by the year 2030 (UNESCO 2015). Reading the UN document spelling out the seventeen SDGs, and especially from the Incheon Declaration, it is clear that SDG 4 is exceptional in that it (education) is not only seen as an SDG by itself but also portrayed as instrumental to and a precondition for the realisation of the other SDGs.

Closer to home, within the field of comparative and international education and reflecting on the state of and road ahead for the field, Iveta Silova (2021), in her 2021 CIES presidential address, called for more urgency to be lent to environmental concerns and climate change, recognising that we as humans are an integral part of a much larger environment and often act in ways that are destructive to our own life spaces. That the ecological crisis and the human response in the field of education have registered on the comparative and international education research agenda is evident from, for example, the recently published paper of Ress et al. (2022) in the *Comparative Education Review* entitled ‘Representations of Humans, Climate Change, and Environmental Degradation in School Textbooks in Ghana and Malawi’, and in a book edited by Harvard comparativist Fernando Reimers (2021).

Demography

Recent history (and, albeit to a lesser extent, the current era) has been one of a population explosion. The details of this explosion, which took off around the middle of the 20th century, have been explained in Chapter 2 and will not be repeated here. Its twofold relation to the global education expansion project will be noted. Firstly, this explosion resulted in a particular population age pyramid, namely, a bulge in the young population sector (under 25-years-old). This created a need and a space for the expansion of education. Secondly, as was detailed in Chapter 2, education is widely looked to for the curbing of population explosion; the rationale is that there exists an inverse correlation between the number of years of schooling and fertility rates in a society.

One further demographic feature of the modern world and its intersection with education needs to be noted. That is the feature of population mobility. Two prominent vectors of global population migrations are that of East (Asia and Middle and the Near East) to West (Europe and North America) and South (Africa and Latin America) to North (Europe and North America). Both these entail a movement from the Global South to the Global North. These are exactly the protrusions of the Global South into the Northern Hemisphere (to return to and to further elucidate the definition of the Global South proffered in ch. 10). Apart from the effect this has, creating more diverse societies and inducing the creeds of multicultural education and intercultural education, it should be pointed out that globally, there are currently 26 million refugees – the largest number ever recorded – half are children, and 85% are being hosted in developing countries (Monkman 2022, p. 4). Over 100 million people have been forcibly removed globally, including 12.8 million people in Ukraine (Monkman 2022, p. 4). To assist these vulnerable people in their predicament, the extension of education as help is widely suggested, as Karen Monkman (2022, p. 4) has recently done in her 2022 CIES presidential address. The interrelationship between migration, global and international migration patterns and education are manifold. Education is a major cause of migration, and the migration of people results in huge challenges for the accommodation of immigrant children. Migration causes a brain drain in some parts of the world, a brain gain in others, and a brain circulation in yet others. All these aspects of the interrelationship between migration and education have been unpacked in a recently published book authored by Amy North and Elaine Chase (2022).

Population mobility – echoing frequent sentiments in society, such as xenophobia and the recent rise of populism in many parts of the world – has often been depicted by social science scholars in negative terms, for example, as a threat and a negatively disruptive force in society, giving rise to conflict or constituting a crisis (Shah 2020). Recently, scholars such as Sonia Shah (2022), Fourie (2022) and Abramitzky and Boustan (2022) have begun to depict migrations as a positive force in history and in societies. The education implications (and also the implications for comparative and international education) have been the rise of the Creed of Multicultural Education, later superseded by the Creed of Intercultural Education (cf. Pica-Smith, Veloria & Contini 2020).

Sociocultural shaping forces

A number of motivations for the global education expansion project can be found in the sociocultural societal sphere. Firstly, education has come to be seen as a ladder for social mobility (cf. Baker 2012; Bills 2003; OECD 2018; Spangenberg 1990). This includes both individual mobility and group mobility, the latter meaning the upliftment of entire groups of communities. For virtually every social ill, society turns to education for a cure, be it drug abuse, irresponsible driving of automobiles or HIV and AIDS (Brezinka 1981).

As was explained above, the mid-20th century societies became more and more multicultural and heterogenous, and multicultural education and intercultural education have been developed in order to bring about a state of peaceful co-existence and equal rights to all cultural groupings (see Wolhuter & Van der Walt 2022). Education is leveraged to address social pathologies or concerns, racial injustice and xenophobia, gender violence and increasing poverty (Monkman 2022, p. 4), and recently, very salient, to come to terms with the COVID-19 pandemic and its aftermath (e.g. see Reimers 2022; Wolhuter 2021; Wolhuter & Jacobs 2021). The pandemic has also come to be seen by scholars in the field as an occasion to rise to or an opportunity to seize – the COVID-19 pandemic had hardly broken out when, in one of the top journals of the field, *Compare: A Journal of Comparative and International Education*, eight leading scholars in the field (Oleksiyenki et al. 2020) wrote an article about the pandemic initiating in the field ‘a new key’.

Economic

On the socioeconomic sector as the shaping force of the worldwide education expansion project, two notes should be made. In the first place, education is seen as an increasingly pivotal requirement for economic progress, that is, as societies move through the stages from a hunting and gathering economy to an agricultural economy and on to an industrialised economy, a service-based economy and then a knowledge economy. Although, as was explained in Chapter 5 (where the drive for vocational education was discussed), this is a very simplified view of the very complex interrelationship between education and economy, this belief, encapsulated by modernisation theory (see ch. 2) and further promoted by human capital theory (see ch. 1), provided much of the rationale for the global education expansion project, which gained traction since the mid-20th century. It was also at this time, the 1960s, with human capital theory on the rise, that a key publication empirically validating the beliefs of the proponents of human capital appeared, namely, Frederick Harbison and Carl Meyer’s (1964) *Education, Manpower and Economic Growth: Strategies of Human Resource Development*. These two scholars calculated a Pearson correlation coefficient between the level of education development (such as investment in education and enrolment ratios) on the one hand and economic strength on the other of 75 countries. They came to a convincing correlation coefficient of 0.88.

Secondly, on the economic sector as a shaping force of education in the contemporary world, the global education expansion action was made possible by economic circumstances, namely, the post-war miracle, reaching its zenith in the decade of the 1960s and then again with the economic upswing which commenced in 1990. Concomitant with the onset of the neoliberal economic revolution (see ch. 5), the world stepped into one of the most forceful, longest and sustained economic growth phases since 1990. Over a ten-year period (2005–2015), the global annual economic output more than doubled, from US$29.6tn to US$78.3tn (World Bank 2016); that is, in the long run, the 2008 economic crisis made no impact. This rise has continued to reach US$ 84.4tn in 2018 (World Bank 2020). Once again, over the long term, the COVID-19 pandemic registered no demonstrable impact; as of 2022, the global economic output came to an unprecedented high of US$ 96.1tn (World Bank 2022). These higher levels of affluence made possible increased private and public investments in education. According to Morgan Stanley (2023), the global education industry market reached US$6tn in 2022 and is predicted to rise to US$8tn in 2023.

Political sphere

From the socio-political sector, a number of causes for the feverish education expansion drive over the past 75 years can be detected. As the population increasingly looked to education as a means of social mobility and securing coveted employment, the supply of education became a way for governments to gain legitimacy. The first decades of the massive global expansion of education were still a time of the omnipotent, colossal central state machinery, and education was looked to as a place for the training of a civil service corps (cf. Idenburg 1975). Most countries in the Global South were artificial creations, that is, they were created to suit the interests of (erstwhile) colonial powers, with scant or no regard for the interests of the subjected peoples of the colonies. Hence, after independence, there was a need to mould national unity, and education was looked to as a way to forge national unity and to create a national identity and identification with the new nation and state (cf. Salmon-Letelier 2022; Thompson 1981). An extreme case – but a graphic illustration – of education harnessed to lend credibility to a national-political project was after Hugo Chavez' coup in Venezuela in 1998 (see Anselmi 2012).

Religion and life and world philosophy

The relationship between religion and schooling is extremely strong but complex. What is important to note with regard to the rising imperative for education expansion at the end of the 20th century and the beginning of the 21st century is the rise of the Creed of Human Rights as a moral code in a globalised world. In Chapter 3, the rise was detailed, and how it has resulted in the drive for human rights education. The belief that (at least basic) education is a right of every person and that education has a pivotal role to play in creating a global moral order predicated on the Creed of Human Rights has been part of the force driving the worldwide education expansion project. It should be added here because it is very pertinent to the thesis of this book that the dynamics of the Creed of Human Rights in shaping education in the Global South are co-determined by Global South contexts, which differ from that of the Global North. An example of this can be tabled in Wahl's (2016) study of human rights education in India: actors in education in India do not simply endorse and reproduce world culture with respect to human rights education, they infuse that education with local meaning.

Momentum generated by the education sector itself

A final factor in the taking off of education expansion was education itself. It appears as if the 1955 threshold referred to above, when, for the first time in history, the majority of adults in the world could read and write, education was seized upon as a means of reaching people. This led to a valuing of education which in turn gave more impetus to the continuous expansion of education. A virtuous circle was established of a valuing of the power of education and the expansion of education. The role of UNESCO and the drives of the global community as a collective, such as the Education for All movement, the MDGs and the SDGs with the Incheon Declaration, detailed in Chapter 3, have been doing much to sustain the momentum of this virtuous circle of education expansion giving rise to a call for more education expansion.

On the point of the education expansion, education systems themselves are feeding the virtuous circle and stimulating more education. One of the theoretical positions that emerged in the phase of heterodoxy (after 1970, Phase 6, see ch. 1) is the morphogenetic theory, first explained by Margaret Archer (1984) in her book *Social Origins of Educational Systems: Take-Off, Growth and Inflation*, in which education and the education system machine are accorded agency in the continual expansion of education systems. Comparative education doyen Erwin Epstein (1992) identified morphogenetic theory as one of the three major theoretical orientations in the field.

The extent of the global education expansion project: Enrolment swell

The global education expansion that emanated from the above-explained societal antecedents is still surging ahead at full speed. The extent of this exercise can be gleaned from the rise of enrolments at all levels of education. These are presented in Table 11.1.

TABLE 11.1: Global growth in enrolments (millions).

Year Level	1950	1960	1980	2000	2020
Primary education	177.1	243.4	541.6	654.7	750.1
Secondary education	38.0	68.9	264.3	543.5	613.1
Higher education	6.3	11.1	51.0	99.5	235.3

Source: Adapted from UNESCO (1971, 1983, 2022) and (Wolhuter 2023, p. 135).

Even after discounting the population increase in the period, the education expansion remains impressive, as can be seen from the growth of gross enrolment ratios, portrayed in Table 11.2.

TABLE 11.2: Global gross enrolments ratios in education (percentages).

Year Level	1950	2000	2020
Primary education	59.00	98.77	101.85
Secondary education	13.00	57.93	76.80
Higher education	5.00	19.08	40.00

Source: Adapted from UNESCO (1971, 2022), Wolhuter (2023, p. 135) and World Bank (2022).

The growing stature of the Global South in the global education project

The global education expansion project has been more pronounced in the Global South; even at the higher education level, the majority of enrolments globally are currently in the Global South. Of the global total of 750 million primary school enrolments, 664.7 million enrolments are in low- and middle-income countries (UNESCO 2022). While the number of higher education institutions barely changed in the Global North, remaining at around 20,000 from 2006 to 2018, in the Global South, the number almost doubled from a little over 40,000 to about 70,000, to make a global institutional total of 90,000 (McGregor 2022). World higher education student numbers are now topping the 200 million mark (see Table 11.1). However, higher education enrolments in the Global North reached a maximum in 2011 and have been decreasing since, to around 58.3 million in 2018. In the same period, the number of students in the Global South has almost doubled, from 78 million in 2006 to 150 million in 2018 (McGregor 2022).

Education reform

The global education project, which has gained traction over the past 75 years, did not only entail a quantitative expansion or 'more of the same', that is, a swell in enrolments. It also entailed a host of incessant, hurried reforms (Wolhuter 2020, pp. 1–28, 2023, pp. 131–146; Wolhuter & Jacobs 2022, pp. 3–24). These reforms can be classified into or subsumed under the four narratives also extant in the field of comparative and international education, enumerated in Chapter 1 as the human capabilities narrative, neoliberal economic revolution narrative, the human rights narrative and the social justice narrative.

Much of the education reform taking place around the world in the past decades can be traced back to the neoliberal economic narrative. Fitting into the neoliberal economic narrative is the GERM, the trend towards education decentralisation, the school autonomy movement, the school voucher system and rising managerialism and performativity in education (all discussed in detail in ch. 5). Key features of global higher education, which have been spreading over the world since roughly 1990, stem directly from neoliberal economics. These include predicating higher education on the profit motive and on relevance, rising performativity and managerialism in higher education and the trend from Mode 1 to Mode 2 knowledge (see Wolhuter & Jacobs 2021).

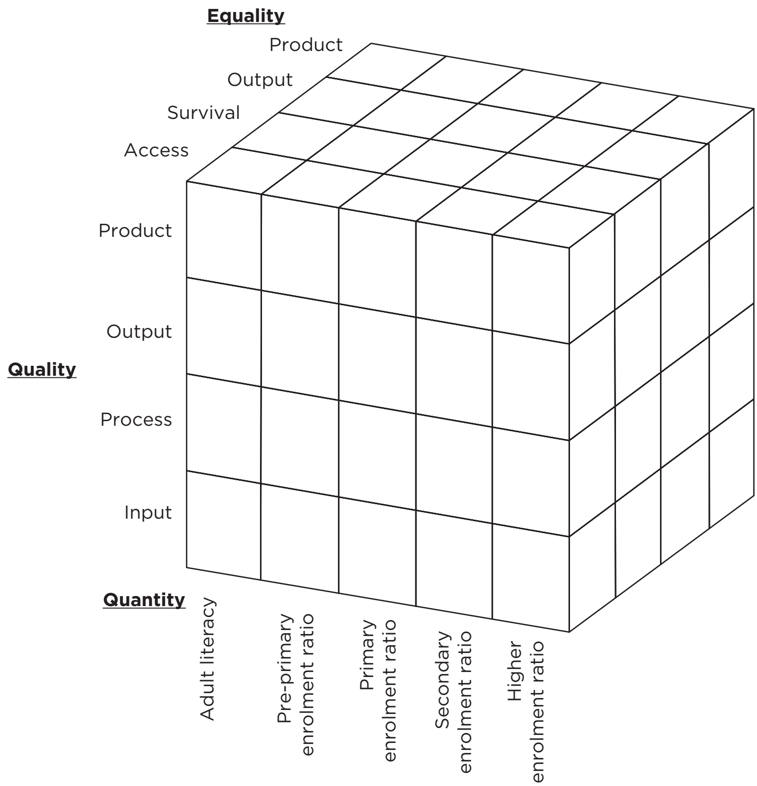
The human rights narrative, that is, the belief in education as a human right and the belief in educating through and educating for human rights (explained in detail in ch. 3), is the philosophical underpinning behind much education reform in the past decades, from the banning of corporal punishment in one country after the other to the inclusion of education and human rights modules or courses in many teacher education programmes.

The social justice narrative can be related to many reforms, such as the desegregation of schools movement, the formation of comprehensive schools and other attempts to equalise education. The narrative of human capabilities will be discussed in Chapter 12.

Assessment of the global education expansion project

Assessment framework

The assessment of any education system or project should take place along three dimensions, namely, the quantitative, the qualitative and the equality dimensions (see Wolhuter 2014; Wolhuter, Van Jaarsveld & Challens 2018; Wolhuter & Van der Walt 2018). These can schematically be portrayed as seen in Figure 11.1.



Source: Wolhuter (2014).

FIGURE 11.1: Model for the evaluation of a national education project.

Quantitative dimension

To commence with the quantitative dimension, the decades since the middle of the 20th century certainly were times of an impressive expansion of education globally, as can be seen from the figures appearing in Table 11.1 and Table 11.2.

However impressive, much is still left to be desired (at least if the ideal of Education for All is taken as a yardstick). Even prior to the outbreak of the COVID-19 pandemic, 258 million children of school-going age across the world (or 17% of the cohort) were still not attending school (UNESCO 2020b). This situation deteriorated, at least temporarily, with the outbreak of the COVID-19 pandemic. The onset of the pandemic precipitated decisions of the cessation of school, college and university attendance in all regions of the world. Statistically, this has affected about 91% of the global student population (UNESCO 2020a, 2020c). Even by March 2021, a full year after the outbreak of the COVID-19 pandemic, the education institutions of 26 countries were still in full suspension (UNESCO 2021).

The COVID-19 pandemic had a forceful impact on schooling worldwide. In the 2021/22 school year (i.e. the Northern Hemisphere school year, September 2021–June 2022), 12,400 schools were shut in eight countries (Burkina Faso, Cameroon, Central African Republic, Chad, Democratic Republic of the Congo, Mali, Niger and Nigeria), because they were the target of attacks by armed groups or because teachers had fled (Naidu 2022, p. 8).

Education quality

However, it is not only quantity (access to education or enrolments) that matters. This should be qualified by quality. In fact, in a meticulously carried out study (taking the case of black South African learners), Peter Moll (1991) has shown that social returns to education are more strongly correlated to quality than to the quantity of education. It should be stated at the outset that education quality is no uncomplicated construct, either to define or to measure. It is a complex construct, impossible to track down in a one-line or even a one-sentence definition. A more manageable approach is to compile a catalogue of the constituent components of education quality. Wolhuter (2014) enumerates the following components of education quality: input quality, process quality, output quality and product quality.

Input quality entails the quality or the level of the financial investment or physical facilities of a school or education system (and is relatively easy to measure, and compared to other components of quality, internationally comparable data are abundantly available). Thereby (Wolhuter 2020; Wolhuter & Jacobs 2022):

> Process quality is the quality of teaching and learning [*taking place in education institutions*] and in education systems. Process quality, in turn, can be [*divided*] up into the following: the administrative substructure; the curriculum; teacher-bound factors (training of teachers, experience of teachers, input of teachers, and teaching methods); school-bound factors (leadership, school climate, and organization culture); family-bound factors (family and home environment, and parental involvement in schools); and learner-bound factors (initial situation regarding the level of knowledge and development when learners enter the school, and learner input). (n.p.)

Output quality refers to the outcome or end result of the learning process, activity or cycle, for example, the achievement levels of learners at the exit point or any stage of a learning programme or school cycle. To measure output quality is not difficult. Moreover, data in the form of official statistics are often readily available, for example, the results of the South African matriculation examinations or the results of international test series such as the PISA or the International Association of Education Achievement (IEA) tests. The latter include the regular TIMSS tests and the regular PIRLS tests. Product quality refers to the effect of education – or the impact thereof –

both on an individual level (such as the income-earning chances of the graduate) and a societal level (such as the impact of education on economic growth). One frequently used indicator of product quality on the individual level is rates of return analyses (cf. Blunch, Darvas & Favara 2018; Lozano 2011). Societal product quality is more difficult to assess than individual product quality. Societal product quality includes, for example, increased economic productivity of a national economy, political returns (such as entrenching a culture of democracy, moulding national unity or creating a national identity) and social returns (e.g. promoting social cohesion or social capital, deepening a culture of democracy or serving as an instrument of social mobility [cf. OECD 2018].

On all fronts, education quality in the world is seriously wanting, especially in the Global South. As an example (Wolhuter 2023):

> [*S*]tudent teacher ratio at primary school (an indicator of input quality can be taken). According to World Bank (2022) data, the aggregate students per teacher ratio in the high-income countries is 14, in the case of the middle-income and low-income countries (the Global South roughly corresponds [*to the middle and low-income countries*]) this figure is 25. (p. 136)

On process quality, the example of an ineffectual administrative substructure can be taken. The administrative substructure in many education systems is staffed by incompetent functionaries or is so debilitated by corruption, cronyism and nepotism so as to handicap the entire education system. The South African National Student Financial Assistant Scheme (NSFAS), at the time of writing, has been placed under administration, as the body was incapable of administering itself (Le Cordeur 2023, p. 11). Thirty-five thousand students have been caught supplying false information so as to gain financial benefits from a scheme already judged to be too generous to students (cf. Le Cordeur 2023, p. 11); that is, the available funds could be used to include more students. There are serious problems with the NSFAS administration paying over students' allocations to universities to cover the students' university fees (Le Cordeur 2023, p. 11). This results in universities withholding students' grades and degree certificates, students not being able to register for their professions, and, as a result, being unable to secure employment (Le Cordeur 2023, p. 11).

Another process quality, school-bounded factor: the mere requirement of school safety is seriously lacking in many parts of the world. The 2023 calendar year in South Africa commenced with a horrendous assassination attempt on the principal of one of South Africa's public universities and the fatal wounding of his bodyguard and car driver at the gate of the official residence of the principal (Sangotsha 2023, p. 2). This was the latest in a spate of attacks and even assassinations at that institution after the current principal started a clean-up operation to end corruption and mismanagement of funds and after the university, for the first time in 30 years, received a clean audit (Gouws 2023, p. 10). As academician and newspaper column writer Amanda Gouws (2023, p. 10) commented, the mere fact that a university principal is in need of a bodyguard is a serious indictment of the state of an education system – a university is a place where students and faculty should feel free to express views without any fear of reprisal. Naidu (2023) describes the South African university sector as being 'engulfed by corruption', while this theme of the incidence, corruption and the debilitating effect thereof on the quality of education at South African universities has been the theme of a recent book, entitled *Corrupted: A Study of Chronic Dysfunction in South African Universities*, authored by erudite South African scholar Jonathan Jansen (2023).

The 2022 matric examinations in South Africa were severely tarnished when it emerged that more than 1,000 learners allegedly cheated in six provinces, possibly in cahoots with teachers, who accepted bribes for providing answers to learners via WhatsApp groups (Naidu 2022, p. 8).

Turning to output quality, there is a constant stream of publications and media reports expressing concern about output quality, even in affluent Global North countries or in what are widely regarded as model or exemplary education systems. According to government figures, in the region of England, 8 million adults have the numeracy skills of primary school children (Isgin 2023). Furthermore, 60% of disadvantaged pupils do not have basic mathematics skills by the age of 16 (Isgin 2023). On output quality, the Global South is also trailing the Global North. An indication of the extent of the position of output quality in the Global South versus the Global North can be obtained from the 2016 PIRLS international test series. Among the top ten countries in terms of achievement, all were from the Global North. The average score of Grade 4 learners in the top five slots was 500 (norm-referenced average score among 50 countries) (IEA, TIMSS & PIRLS 2017):

- Russia: 581
- Singapore: 516
- Hong Kong: 569
- Ireland: 567
- Finland: 506

By contrast, all countries in the bottom ten slots were from the Global South. The average score of Grade 4 learners in the bottom five slots were (IEA et al. 2017):

- Oman: 418
- Kuwait: 393
- Morocco: 358
- Egypt: 330
- South Africa: 320

On product quality, schooled and graduate unemployment plagues many nations. An estimated 450,000 of the 2021 matriculants in South Africa have ended up unemployed (Naidu 2022, p. 8). Despite the massive education expansion in recent decades, there are 7.2 million unemployed in South Africa (Naidu 2022, p. 8), 2.6 million of these have matric (Naidu 2022, p. 8).

Equality in education

On the equality front, it is not difficult to find concerns or even undisputable evidence of inequality or inequity (no matter how defined) in even what is widely regarded as very egalitarian societies and education systems. The 2021 matric (secondary school termination) examination pass rate in South Africa was 76.4% (Naidu 2022, p. 8). About 900,000 sat for the examinations, the universities in the country could take in only 127,000, meaning many of those qualifying for university admission will not be able to secure access to universities.

Conclusion

Thus, after having existed for millennia at the fringes of society or, in many societies for a long time until very recently, totally absent, education, in the sense of planned, organised, structured teaching and learning in formal institutions, public education in particular came off the ground after the Second World War and moved to the centre of public life. A massive global education expansion project gained traction and is continuing to gain momentum up to this day. At the basis of this expansion, a host of very high expectations of education and of the societal outcomes of education supplied the rationale for this expansion. A considerable part of the global expansion project has been taking place in the Global South. In fact, the majority of enrolments globally, at all levels of education, are in the Global South, and increasingly so. However, despite the massive enrolment swell globally, education is facing major challenges in all parts of the world, but more so in the Global South. These challenges are present along all three dimensions of education expansion: quantitatively, qualitatively and equality-wise. This is where the vision of a new phase of comparative and international education to rise to the occasion comes into play. The next chapter will draw the outlines of such an envisioned Phase 9 in the evolution of comparative and international education.

Chapter 12

Promise of a new chapter for comparative and international education

Abstract

This chapter synthesises the findings of all the preceding chapters and offers a vision of an immanent Phase 9 in the historical evolution of the scholarly field of comparative and international education. The signature feature of this phase will be the affirmation of the Global South in the field and in education in the world. This chapter summarises criticism currently rife among scholars in the field, making a case for the next phase. It outlines the parameters of this envisioned new phase in the evolution of the field. The affirmation of the Global South should be in a way that is not a declaration of war against the Global North, but the affirmation should be done in such a way that the field in its entirety is enriched, so much so that it even opens new vistas also for the exploration of the Global North, to the benefit of education in the Global North as much as to the benefit of the Global South. The chapter also connects to the narrative of human capabilities theory, which is extant but grossly underdeveloped in the field. A new phase, Phase 9 in the evolution of the field in which the Global South is given its rightful space, should make generous space for the narrative of human capabilities to come to its right in the field. Phase 9 will continue the

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pattern of the preceding eight phases, putting in place a field of scholarship that is available as a valuable asset to humanity and to the global education expansion project.

Introduction

In this concluding chapter of this volume, the findings of the preceding eleven chapters of the book will be synthesised, and a vision for the future blossoming of the field of comparative and international education will be laid out.

Historical evolution of the field

Eight phases culminating in the present Phase 8: Criticism against Northern hegemony

In Chapter 1, the historical evolution of the field of comparative and international education was reconstructed. The conventional reconstruction of the field as consisting of seven phases was described. It was suggested that currently, an eighth phase is perceivable. The tenets of this phase can be subsumed under the construct of 'criticism against Northern hegemony'. These interrelated tenets in the current discourse in the field, in which criticism against Northern hegemony in the field and in education comes to the fore, were enumerated as (Wolhuter 2023):

> [*C*]riticism of the imposition of one model of development; criticism of foreign aid and of international agencies; anti-globalization; criticism of neoliberal economics and its impact on education; calls for the decolonization of education and of comparative and international education; criticism of racism in education and in comparative and international education; an appreciation of indigenous knowledge systems; and allegations that scholars of the Global South find themselves on an unequal playing field (see Wolhuter et al. 2024). (p. 2238)

In Chapters 2 to 9, each of these strands teased out and explored and each time found to be not without merit, but at the same time, the changes or reform needed in the field to address the challenges indicated by these criticisms should proceed within the borders of a clear set of parameters. In Chapters 10 and 11, it was explained that the stellar rise of the Global South on the global scene, societal-contextually and educationally also makes the crafting of a more balanced, equitable field of comparative and international education compelling. Such a crafting is this author's vision of the next imminent phase in the evolution of comparative and international education, a phase in which the field will anew be an invaluable asset to humanity.

Vision for Phase 9: Affirmation of the Global South

The vision laid out for a forthcoming ninth phase in the evolution of the field of comparative and international education will, in the first place, feature the development of models of societal and education progress, transformation or development tested in and crafted for Global South contexts. In the construction of such models, the Creed of Human Rights and the Global Commons should serve as fixed beacons. Given the place of the Global South as the leader of many societal dynamics and contemporary societal trends, such models will have relevance or value not only for the Global South but for the Global North as well.

In the contemporary world, foreign aid and international agencies are a given on the education and broader societal scene. In a world where the affirmation of the Global South features, the discontents of foreign aid and international agencies should be identified and highlighted. At the same time, it should be recognised that, especially of late, international agencies have done much with respect to the promotion of education in the Global South and that international agencies in a current, globalised world is a given, which should be factored into any charting of a future course for education in the Global South. Foreign aid and international agencies as actors on the global education scene should be harnessed to the advantage of the Global South. In this regard, scholars of comparative and international education can profitably make use of the paradigm of cultural revitalisation. Paulston (1977) identified this paradigm in the comparative education landscape and described it as, amidst the (depiction of) people being trapped in the grips of power relations, instances where people at either local or national level could indeed succeed in establishing more satisfactory cultures. As an example, he cites the education of black Muslims in black ghettoes in the USA, described by Ibrahim Shalaby (1980). Another example would be the Rojava education revolution in North-East Syria where the Kurdish community has established their own education system right up to the Rojava University (see Miller 2022). In the history of education in South Africa, the Christian National Schools established in the Transvaal and in the Orange Free State during the first decade of the 20th century is also an example (see Pistorius 1968). Steenwegen, Clycq and Vanhoof (2023) have recently published a comparative review study of how minority groups self-organise education.

Foreign aid and the work of international agencies ride on the back of globalisation. Globalisation has been a compelling force in the world, and also in the world of education in particular, for the past 35 years. A strong anti-globalisation lobby is visible in the field, and a major part of this revolves around considerations of social justice and global social justice (Global North–Global South). In their arguments, there is much merit, and the discontents of globalisation should be thrashed out. At the same time, two cautionary notes should be made. Firstly, globalisation has made possible or at least can facilitate the realisation of the noble goals of comparative and international education. These should be capitalised upon. Secondly, there are currently signs of deglobalisation in the world. Researchers in the field should point out the pernicious outcomes or potential outcomes of this trend.

The economic side of the contemporary trend of globalisation is the neoliberal economic revolution. Neoliberal economics have left a powerful footprint on education. Its effects on education include the cutting down of state expenditure on education, educational decentralisation, the privatisation of education and the school voucher movement, the school autonomy movement and carrying into the education sector the principles of neoliberal economics such as the profit motive, accountability, efficiency and performativity. As in the case of globalisation, it would be futile for scholars to attempt to eradicate this revolution and to reverse the gear of history. In view of economic realities and the poor track history of alternatives tried, it would be unwise in any case. On the contrary, out of consideration of social justice and professional autonomy of the teaching profession and the full meaning of education, much criticism can be levelled against the neoliberal economic revolution and its effect on education. These adverse effects of the neoliberal economic revolution seem to be especially severe in the Global South. A new model, giving due space to each of the state, the market and civil society, should be developed, circumscribed by the Creed of Human Rights, so as to ensure social justice fits into the equation of a new societal dispensation. Although being an assignment extending much wider than education and comparative and international education, in bringing about such a dispensation, scholars of comparative and international education, in their research on the Global South, have an indispensable role to play.

Criticism against Northern hegemony is also evident in the calls for decolonisation, that is, decolonisation in education in general and in the field of comparative and international education in particular. Colonialism has been a fact of history, and education has been used as an instrument of colonisation. To limit the discourse on the aberrations of colonialism and colonial education to the Western colonisation of the extra-Western world over the past half a millennium would, however, be to render such a discourse inaccurate, incomplete and poor – similarly if the call for decolonisation turns into nothing more than an anti-Western tirade. An acknowledgement of colonialism in all its forms in the world in the past and the present and a discussion of decolonisation based on such an acknowledgement would be a much more meaningful exercise in crafting a field where the Global South, coming to its rightful place, can be explored and interrogated in order to provide guidance to create a world in which education premised on human rights serves all.

In contemporary comparative and international education, criticism against Northern hegemony also appears in the form of criticism against racism in education and in comparative and international education. In Chapter 7, it was shown that recent events in the world have given rise to a heightened awareness of racism in the field and to a new commitment and drive to eradicate racism in the field and in education. The chapter proffers a definition of racism and cautions against a biased, one-sided or selective criticism of racism in the field, easily going over into a(nother) kind of racism itself. An even-handed commitment to the eradication of racism from whichever quarter can contribute to a new phase of comparative and international education being an asset of humanity in its quest to meet the future.

In Chapter 1, it has been explained that four narratives currently extant in comparative and international education are the human capabilities narrative, the neoliberal economics narrative, the human rights narrative and the social justice narrative. The neoliberal economics narrative, the human rights narrative and the social justice narrative were discussed in, respectively, Chapters 3, 5 and 6. Of the four, the one most underdeveloped in the field is the human capabilities narrative.

It can be argued that the 21st century, with salient features being individualisation and the rise of knowledge economies, both of which value creativity and individual excellence and self-actualisation, asks for a kind of education in which each individual is granted the opportunity to maximally realise their own potential and to pursue their own interests, preferences and happiness. The philosophy of human capabilities, as formulated by exponents Amartya Sen (1999), Martha Nussbaum (2000) and others, views human beings as having huge potential and capabilities. Human capabilities are described as the freedom of humans to pursue their own interests, that which they are interested in, or the freedom of humans to make their own choices. This approach advocates for arrangements to be made for these capabilities to be realised (cf. Potgieter, Van der Walt & Wolhuter 2016). Education enables human beings to have more freedom to make choices. Useful when contemplating the role of education in establishing or realising human capabilities is Martha Nussbaum's (2011) notion of 'combined capabilities', that is, 'internal capabilities' (e.g. the skill of thinking critically or the knowledge a person has), combined with the external or social-contextual circumstances that empower (or limit) a person to live out their capabilities.

The urge for creating space for creativity (see Grigorenko 2019) also fits in comfortably with this approach of human capabilities (Wolhuter, Espinoza & McGinn 2022). Richard Florida (2002), in his book *The Rise of the Creative Class: And How It's Transforming Work, Leisure and Everyday Life*, explains how a growing creative class or category of workers has become the driving force of a new economy. Examples of the human capabilities narrative in comparative education include publications by the Institute of Education, University of London scholar Elaine Unterhalter (2020), Kim (2014) and Algraini (2021). Robeyns (2006) was probably the first to identify human capabilities as a (potential) theoretical orientation in education. In their recently published edited volume offering a conspectus of the 27 theoretical frameworks in the field of comparative and international education, human capabilities are identified as being among the theoretical frameworks in the field (cf. DeJaeghere & Walker 2021). As an illustration of the promise of the human capability approach, in a recent publication, Alison MacKenzie and Tien-Hui Chiang (2023) argued for the human capability theory to be used as a perspective replacing or at least complementing human capital theory in guiding education reform; as a way to create an education system more congenial to people from lower socioeconomic strata – an argument of interest to the thesis of this book, namely, the affirmation of the Global South in education. In a recent publication, Khanal, Pokhrel and Dewey (2023) used capability theory as a lens to gain a better understanding of inequality in education in India and Nepal.

The imperative for education to promote individual excellence (see Rivkin & Yemini 2023) – an imperative that is more acute in the current competitively globalised world – also fits in with this narrative of human capabilities. Historically (and accentuated at the beginning of the neoliberal economic revolution and its impact on education), individual excellence has been conceptualised in education scholarship and in the public education discourse as being related to and measured by officially set outcomes or standards. However, there is a growing call for self-excellence in education to be viewed as self-improvement (see Rivkin & Yemini 2023).

Yet despite the imperatives for giving space to creativity, individual excellence and the development of human capabilities, as a relict of the past – and some competing contemporary forces (as was explained in ch. 6), the education systems of the world have been predicated on, in the words of historian and social scholar Yuval Harari (2015):

> [*N*]ations [...] established gigantic systems of education, health and welfare, yet these systems were aimed to strengthen the nation rather than to ensure individual well-being. Schools were founded to produce skilful and obedient citizens who would serve the nation loyally. (p. 30)

Likewise, within the field of comparative and international education, this theoretical framework of human capabilities is grossly underdeveloped. Tellingly, DeJaeghere and Walker's (2021) chapter on human capabilities theory is the last chapter in the edited volume of Jules, Shields and Thomas (2021), enumerating and discussing the 27 theoretical positions extant in the field of comparative and international education. Compared to the volume of publications from the other three narratives, publications from the narrative of human capabilities are sparse. For the realisation of the ideal of 'pursuit of life, prosperity and happiness', one of the Global Commons, as explained in a basic axiom of this publication, an education system crafted on the narrative of human capabilities is essential. This applies to the Global South as well. Therefore, the envisioned Phase 9, characterised by the affirmation of the Global South, would be affirmed in such a way that an edifice of knowledge and an education practice is brought about to benefit all people and should allocate generous space for the human capabilities narrative.

■ Other possible benefits from Phase 9

Other spin-offs of Phase 9, if approached and crafted correctly and with vision, can address the other challenges besetting the field at the present point in time. These challenges were enumerated in Chapter 1. Maria Manzon (2011), in her book on the crafting of the field of comparative and international education, takes the cue from firstly comparative and international education's aphorism of anything educational being shaped by contextual contours and, secondly, from the philosophy of Michel Foucault, that all fields of knowledge are socially constructed. Hence, this author's contention that the Global South is coming to its right in the field may help address other shortcomings in the field as well. These (enumerated in ch. 1) will now be again examined in the light of the argument presented in this book.

The first challenge that has historically been besetting the field is the failure to respond to the lure of new possibilities. The first of these that can be noted is with respect to various geographic levels of analyses extant in the field. In Chapter 9, the geographical levels of (possible) analyses in the field, as delineated by the oft-cited Bray and Thomas Cube were discussed, as well as the criticism that has been expressed against the cube as a heuristic device. Despite the Bray and Thomas Cube (Bray & Thomas 1995, p. 475) indicating seven levels of analyses:

1. World regions and continents
2. Countries
3. States and provinces

4. Districts
5. Schools
6. Classrooms
7. Individuals.

Wolhuter (2008) has added two more to make up nine: world; super-continent; continent; supra-country; country; sub-country (i.e. state, province, city or category of the population of the country); institution; class; and individual, the national level has tenaciously remained the dominant level of analysis. In Chapter 9, it was explained that the key concept or threshold concept of 'context' in comparative and international education is in need of major revision and that it has been argued that the conceptualisation of the various levels of analyses, as represented in the Bray and Thomas Cube, contribute towards tilting the playing field in comparative and international education against the Global South. It was further stated in Chapter 9 that the current neglect of lower-level geographical analyses (compared to analysis at higher geographical levels) works disproportionally to the disadvantage of the Global South. Hence, a more intensive exploration of the Global South, at geographically smaller levels of analysis, can have the spin-off of eradicating or at least reducing this lopsidedness in the field.

There is a longstanding problem among comparative and international education scholars who are eschewing a discussion on the goals or objectives of education. This is part of a wider-ranging problem besetting the scholarly discourse and even the public discourse on education. As far back as 1954, philosopher Hannah Arendt (1954), in an article on this point entitled 'The Crisis in Education', criticised the progressive education movement that took hold in the USA. According to Arendt (1954), this movement, eshewing any discussion on the goals of education or of spelling out where the educator is guiding the educand, means that the educand is eventually rendered like a boat without a rudder or a captain on the rough sea, left to the dictates of the majority (or, in the scheme of thinking of paradigms of a later age, the powerful) of society. This also opens this way of thinking and researching about education to criticism from the point of the human capabilities narrative in education thinking. Eschewing the goals or objectives in the field is a problem that has stemmed from a confluence of a number of factors. These include the global trend of fields of education scholarship in general moving from the humanities to social sciences. Historically (in its short history of being an autonomous, recognised field(s) or discipline(s) at universities), education was practised as one of the Humanities at the continental universities in Europe, firmly anchored in philosophy (at the German, Dutch and Scandinavian universities) (cf. Sonnekus & Ferreria 1979; Van Zyl 1975) or sociology (at the French universities) (cf. Schriewer &

Keiner 1992; the field of history of education as practised in France was distinctly modelled on the template of the French *Annales* school of historiography) or even psychology (Russia as a notable example, see Van Parreren 1972). In the USA and in the UK, on the contrary, fields of education scholarship were historically practised as one of the social sciences and empirical research occupied a prime position. The weakened position of continental Europe as a result of the Second World War and the rise of Anglo-American hegemony also paved the way for anglophone hegemony in the international academic world and for English to become the lingua franca of global academe. Part of this seismic shift was that fields of education scholarship at continental universities and universities in non-anglophone regions outside of Europe migrated from the broader clan of humanities towards becoming a social science.

In Chapter 5, the fixation by scholars in the field of comparative and international education with big league test data tables and scholastic achievement as one corollary of the neoliberal economic revolution has been explained. How narrow a view that is of the aims of education, and how sorely the placement of the contemplation of the objectives of education on the research agenda is, is clear from criticism against the narrow conceptualisation of the goals of education as achievement in tests by two scholars in the field straddling the ideological divide: progressive Jonathan Jansen (2023) and conservative Andreas Kazamias (see Roussakis 2018). It should be added here that to encapsulate the objectives of education, more than simply narrow instrumental aims, or in more than behavioural terms or (in its modern-day form), a list of 'competencies' is challenging, especially with the English (and English has now become the international lingua franca in the academic world) word 'education' and its narrow meaning, compared to the continental languages as was explained in detail in Chapter 5. Jansen (2023, p. 11) writes that '[...] the fundamental purpose of education [...] to nourish the human spirit', but that is highly unsatisfactory. What is 'the human spirit' or what Kazamias, drawing on the Greek word '*paidea*' (with associations with the philosophy of Socrates clearly audible), calls the 'soul'? Unpacking this difficult concept is the assignment of fields of education scholarship – an assignment these scholars following the present trajectory of these fields so tragically evade.

Another instance where scholars in the field have been keeping within the narrow confines of traditional lines of enquiry despite other promising vistas beckoning has been that of the mode of education. At least five modes of education can be distinguished. The first three, formal, informal and nonformal education, were defined by Phillip Coombs (1985, pp. 20–21). This author has added two others (see Wolhuter 2008): (1) preformal education (i.e. education taking place in the parental home, much of it but by no means all in the pre-school years) and what has become known in comparative and international education scholarship as (2) the shadow education system (private tutoring). Thus far, scholars in the field have concentrated on the formal mode of education, much to the neglect or outright exclusion of other modes of education (Wolhuter 2008). In recent years, private tutoring has become a research focus of a leading scholar in the field, Mark Bray, including publications on private tutoring in Africa (see Bray & Rahamane Baba-Moussa 2023). Yet, publications on private tutoring remain heavily focused on such tutoring in the recently developed East Asian countries. Admittedly, that area is a hotbed of private tutoring in the world. However, the practice is also rife in other parts of the world, including the Global South.

A second challenge facing the field is breaking out of the 'black box syndrome'. As was explained in Chapter 1, ever since the dawn of the 'factors and forces stage' in the development of the field, scholars have paid disproportionally more attention to societal shaping forces of education systems. What is taking place within education systems and in the societal outcomes of education is neglected (see also Baker 2014, p. 9). In Chapter 9, it was explained that, while a luxury the Global North can to some extent afford, this lopsided focus of scholarly activity in the field is something the Global South can ill afford and that the compelling need for the improvement of education quality (as well as equality) in the Global South asks for a rebalancing of research priorities so as to give due attention to what is taking place within education institutions, classrooms and systems, as well as to the societal outcomes of such education in Global South contexts. Given the tongues of the Global South penetrating the Global North (as per the definition of the Global South proffered in ch. 11) and with societal and education contexts in the Global North increasingly approximating those in the Global South (as was explained in ch. 11), such a rebalancing of research priorities within the field of comparative and international education will stand to benefit the Global North as much as the Global South.

The lack of an autochthonous theory was identified in Chapter 1 as a third challenge facing the field. The author is of the view that the definition of comparative and international education proffered in Chapter 1 clearly indicates a unique, exclusive object (and method) of study for the field that eliminates the view that comparative and international education is nothing but an applied or interdisciplinary field. An exclusive object and method of study implies scope for an own or autochthonous theory. While definitely not pleading for a discarding of or denigrating theory and insights from cognate fields of social science inquiry, comparative studies exploring education (systems) in their interrelationships with societal contexts in Global South settings can go a long way in stimulating and making possible the construction of autochthonous theory in the field.

The inadequate and, in many parts of the world, dwindling presence of comparative and international education at universities was identified in Chapter 1 as a fourth challenge facing the field. It was also explained in Chapter 1 that in many Global South universities, the field stands exceptionally and encouragingly strong at universities. A more intense exploration of education in Global South contexts and more South–South comparative studies, and showing the value of the field in teacher education programmes in Global South parts of the world, can do much to strengthen the claim and prestige of the field at on university campuses in the Global South. It is regrettable that in a recently published collected volume (Salajan, Jules & Wolhuter 2023), the first to focus exclusively on the intersection between comparative and international education and teacher education, this intersection in the booming (in terms of enrolments at all levels of education, enrolments in teacher education programmes and the number of universities, including the number of universities offering programmes or modules of comparative and international education). The Global South is explicitly not the subject of enquiry of at least one chapter.

The last challenge is that of impact. One way to promote comparative and international education research registering an impact in practice (that is, improving education in practice) is to do research guiding the implementation of reform (which has gained currency in Northern contexts) in Southern contexts. An example that comes to mind here is a much-cited publication by University of Botswana scholar Richard Tabulwana on how attempts to establish learner-centred pedagogies have, without exception, failed in sub-Saharan African countries because contextual impediments were not taken into account when importing such pedagogies (Tabulwana 2013; see also Tabulwana 2009). Given the rise of the Global South, in terms of societal context generally and education, teasing out education in its contextual interrelationship in Global South settings can go a long way towards making the field of scholarship more streamlined for making an impact in the Global South (and beyond).

In rendering an impact, it should be remembered that comparative and international education has a wide-ranging clientele (term used by Wolhuter 1994) or a diverse set of actors (term used by Bray 2014) active in the field. Research has pointed out that some actors in the Global South (e.g. teacher unions) are not part of policy discourses (Brøgger et al. 2016). This research reveals the networks through which discourses on policy take place and are spread, demonstrating Northern dominance. Thus, even if research can reach such actors in the Global South, its impact will be constrained and will not be the same as in the Global North. A rectified situation where the Global South comes into its own right will open new avenues for scholars of the field to render an impact by means of their research.

Conclusion

Thus, this book culminates in a vision wherein the current criticism of Northern hegemony in the field of comparative and international education and in education practice is given a positive turn when going over into the dawn of a new Phase 9 in the evolution of the field, a field characterised by the affirmation of the Global South. This affirmation envisioned should not be a statement against the Global North but a positive affirmation of the Global South, coming into its own right in the field in the production of new knowledge, new insights and new theory in such a way that it will be to the benefit of all humanity, affirming anew the value of the field of comparative and international education.

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Chapter 1

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In the realm of comparative and international education, scholars are challenging the dominance of Northern perspectives. This book explores the myriad criticisms levelled against this hegemony, spanning issues such as development models, foreign aid, neoliberal economics, and calls for decolonisation. It also examines racism in education and advocates for the recognition of indigenous knowledge systems. As the Global South gains prominence on the global stage, this scholarly book argues for a more equitable representation in the field. Offering a comprehensive survey of these critiques, the author proposes a path forward towards a new phase in comparative and international education, marked by the empowerment of the Global South.

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