Globalization, Curriculum and the Third World State:
In Dialogue with Michael Apple

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An opportunity to respond to Michael Apple is a special privilege, not only because he has been an inspiration to a generation of new scholars (including myself) in the arena of what could loosely be called critical theories of education, but also because of his special ability to track and explain complex turns in educational theory, politics and practice. This he does admirably in "Rhetorical reforms: Markets, standards and inequality" (this issue). I would like to enter into dialogue with Apple's arguments in "Rhetorical Reforms" using as my vantage point the South African policy experience during the transition from legal apartheid in the late 1990s.

South Africa Since Apartheid

At a first glance, it appears that while the cast of characters is different in the South African context, the trajectory of education policy is strikingly similar to what Apple observes in his review of educational reform in England and the United States of America. As I will demonstrate shortly, in South Africa also, the emergence of dominant discourses about markets and competitiveness co-exist with increased surveillance and regulation of schools and universities. But there are some vital distinctions with respect to the politics of education reform within South Africa, even if the effects of these policies show striking resemblances in both contexts.

I raise these distinctions to suggest a limitation in Apple's theoretical landscape that has not, in my view, taken into account the interdependence of the West and the rest of us regarding the relationship between economic markets and educational ideologies. In entering this area, the expansive literature on globalization is a useful point of departure.

It is now clear that education policies and ideologies cross national borders with roughly similar promises, perils and procedures as economic markets (Jones, 1998; Taylor, 1999). It is also clear that in the case of the third world state, these movements can no longer be declared a consequence of the dependency of such states on powerful first world nations. Indeed, the strong version of globalization attributes an overwhelming authority to such transnational forces on a defenseless third world state. But as Linda Weiss (1997) demonstrates in her outstanding empirical work, globalization is not ubiquitous and the state is not powerless. How then does one explain the following trends in education policy after apartheid?

The new citizen and the new work order

Educational reforms since the end of legal apartheid in 1994 have been lodged clearly and consistently within powerful economistic rationales as the overriding motivation for "transforming" apartheid education. Within this framework, changing education is

considered a pre-requisite for economic growth: "outcomes based education" is intended to develop citizens who can compete successfully in international markets; science and technology education is prioritized as the subject fields that will fuel the engine of economic development. The new citizen is to be technologically literate and able to function in a knowledge-driven economy (Department of Arts, Culture, Science and Technology, 1996). This means being multi-skilled and adaptable in a modern economy linked to "the new work order" (James et al., 1996; McLaren, 1998). A flurry of Green Papers, White Papers, Discussion Documents and "Frameworks" reiterate the same rhetorical goals (see Department of Education, 1995; NCHE, 1996; Department of Education, 1997; Samoff, 1997). The economic rationale in the White Paper on Higher Education is typical of what appears in all national policy statements:

This national agenda is being pursued within a distinctive [sic] set of pressures and demands characteristic of the late twentieth century, often typified as globalisation (…) linked to (…) the accelerating integration of the world economy and intense competition among nations for markets. These economic and technological changes will necessarily have an impact on the national agenda given the interlocking nature of global economic relations (...) In particular, the South African economy is confronted with the formidable challenge of integrating itself into the competitive arena of international production and finance which has witnessed rapid changes as a result of new communication and information technologies (Department of Education, 1997, p. 9).

As an aside, it is against this background that the proliferation of private colleges and institutional choice in South African higher education must be read. This free-market citizen can now choose freely from a range of institutional types despite the fact that these private colleges and international "universities" escape, very often, the same harsh regulatory environment applying to public institutions.

Regulation and measurement

Despite having just recently emerged from the authoritarian and state-controlled system of apartheid education, the new state issued a compendium of regulatory arrangements within different policy and legislative statements. The National Qualifications Framework, adopted from New Zealand, inaugurates a standardized system of credits and qualifications that would create the self-regulated, "well-tempered learner" (Muller, 1998). A national office was instituted to develop Key Performance Indicators (KPIs) on the basis of which the entire education system could be regulated and controlled. Each provincial department of education could, for example, irrespective of history and inequalities, be measured against the same KPIs determined by the national Department of Education. The new Higher Education Act empowers the Minister to intervene directly in universities and technikons (polytechnics) through the Trojan horse of "accountability". As this article is being written, five black universities are being investigated by demand of the Minister of Education on charges of financial irregularities. On the face of it, this issue appears to have much more to do with an inability on the part of such institutions to provide higher education to growing numbers of students from disadvantaged backgrounds who really believed that access to higher education would be easier after apartheid. And all higher education institutions are now required to subject themselves to "quality assurance" as another means to ensure efficiency, accountability, and performance. Unsurprisingly, public measures of institutional worth are now commonplace. In 1998, for the first time in

South Africa, a set of organizations produced a controversial media spread on "The Best in Higher Education," using a complicated set of numerical indices to measure educational institutions. The striking observation of this obsession with "performativity" is not only that it freezes history in making these public judgments, i.e. all 22 universities, irrespective of their racial histories and race-based funding under apartheid, are now subjected to the same standardized measuring devices. It is also that new instruments of measurement have been afforded a creeping legitimacy in the rating of public institutions.

Policy transfer

The range of education policy frameworks, from schools to universities, is an amalgam of policy initiatives and rationales drawn mainly, if incoherently, from the West (Jansen & Christie, 1999). "Outcomes based education" takes its cue from the early competency debates in Australia (Christie, 1996) and, more recently, from the work of William Spady in the U.S.A.--dubbed locally "the father of outcomes based education." The National Qualifications Framework relies heavily on New Zealand education policy and, to a lesser extent, on variants of this model from Scotland and other parts of the U.K. The Quality Assurance System is strongly informed by developments in U.K. higher education, but also from variants in the Netherlands and its transportation to Chile and India. The comparison of institutions clearly finds its origins and inspiration in the so-called "league table" developments in England. International experts, visiting consultancy groups, overseas exchange visits, funded conferences and "linkage projects" have enabled and consolidated the transfer and adoption of first-world policy experiments within Africa on a scale never before witnessed in post-colonial Africa. In short, the South African state draws liberally and loosely from policies and policy ideologies in the West in founding its own post-apartheid education system. As a consequence, the South African state can present itself (and its educational system) as a worthy and credible competitor on the stage of a globalized economy.

Education and Economic Redress

Observing the convergence of educational ideologies with the West would end at this point were it not for a fundamental difference in the South African policy trajectory since the end of apartheid. That is, in South Africa these overtly economistic tendencies, reductionist pedagogical strategies (like "outcomes based education") and regulated educational systems are lodged comfortably within a redistributional refrain. The very measures of control and accountability are presented as necessary to shift resources and advantage from those who are white and privileged, to those who are black and marginalized in education and the economy. Advocates of the government's conservative macro-economic strategy, called GEAR (Growth, Employment and Redistribution), describe its rationale as follows: "Against the background of a weakening Rand and deteriorating investor confidence, the strategy [focuses] strongly on the need to enhance the international competitiveness of the economy" (Donaldson, 1997, p. 447). In the same breath, GEAR is linked to: "improvements in the quality of schooling available to the poor and greater equity in the flow of students through secondary and tertiary education--foundations for both long term economic growth and income redistribution" (p. 449). In higher education policy, the problem set is constructed in the same way:

(. . .) an inequitable distribution of access and opportunity for students and staff along race, gender, class and geography. There are gross discrepancies in the participation rates of students from different population groups, indefensible imbalances in the ratios of black and female staff compared to whites and males, and equally untenable disparities between historically black and historically white institutions in terms of facilities and capacities (Department of Education, 1997, p. 8).

And again, the very first White Paper on Education (Department of Education, 1995), following the installation of the post-apartheid government, developed a strong set of prefaces about dealing with inequality, redress and disadvantage through new education policies for schools. Indeed, early drafts of this White Paper infuriated the reconciled opposition for its rhetorical militancy about race and redress (Tikly, 1997).

Across the policy spectrum, the tying of the national economy to international competitiveness is associated with redistributional goals which favor (we are told) those most marginalized in post-apartheid South Africa. But did this happen?

In our research tracking the effects of education policy since the first democratic elections of 1994, and the implementation of GEAR in 1996, the record is clear: the distance between privileged schools (mainly though not exclusively white) and disadvantaged schools (mainly black) has in fact increased. Two examples will suffice. The mass retrenchment of teachers, justified again on the basis of international research on class size and student achievement, has depleted many black schools of teachers. White schools, on the other hand, were able to recoup this loss by dramatically increasing the school fees of the largely white parent bodies in order to keep historical accounts of teachers and learners per classroom constant (Jansen, 1998). The introduction of "outcomes based education" into Grade 1 classrooms enabled white schools to meet the resource demands of this highly sophisticated curriculum package while black schools fell further behind given their low capacity for managing such complex innovations (Jansen et al., 1999).

From this discussion I wish to underline the conscious participation of the South African state within universalizing discourses about education and the economy. Roger Dale makes this point well:
the key features of policy borrowing (…) are that it is carried out voluntarily and explicitly, and that its locus of control is national. It involves particular policies that one country seeks to imitate, emulate or copy, bilaterally, from one another. It is the product of conscious decision-making and it is initiated by the recipient (Dale, 1999, pp. 9-10, my emphasis).

I wish to further make the point that the educational logic of globalization within the Third World state is also expressed as "rhetorical reforms" (Apple's phrase). So, "elected officials and politicians are more likely to be interested in a borrowed policy's political symbolism than its details" and "the particularities of education policies are of less significance than their role in political discourse" (Halpin & Troyna, 1995, pp. 307-308). Elsewhere I have described this tendency in post-apartheid policy as an over-investment in the symbolism of policy rather than a serious consideration of its effects in disadvantaged communities (Jansen, 1997). These observations raise critical questions about the role of political discourses especially in the context of severe and sustained

underdevelopment of the economies of third world states.

Conclusion

This encounter with Michael Apple suggests very different orientations towards time in the contestation surrounding education policy in the United States and in South Africa. Apple is rightly concerned about the restorational professions of the Right in education policy focused on a romantic view of the past. The South African state, on the other hand, promulgates a high-profile discourse about the redistributional qualities of educational policy focused on a romantic view of the future. Yet, whether it is school choice under a restorational banner, or outcomes based education under a redistributional flag, the mechanisms of markets, regulation, and policy borrowing together produce the same policy effects in different parts of the world system. The sub-title to Murray Edelman's 1977 work, Political Language, comes to mind: Words that Succeed and Policies that Fail.

These initial sketches of distinctions and commonalities between first and third world education policies within the context of globalization suggest the need for further explorations with this line of thinking in comparative education. It seems to me that Current Issues in Comparative Education (CICE) is well placed to sustain such conversations.

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