

# Globalisation Qualifications and Livelihoods

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An Annotated Bibliography

Jane Evans



in collaboration with:

University of Chinhoyi,  
Zimbabwe

University of Colombo,  
Sri Lanka

University of Zhejiang,  
PRC

SCHOOL OF  
Lifelong  
Education &  
International  
Development



## Preface

This research report is one of a series completed within the DFID-funded research project 'Globalisation, Qualifications, Livelihoods and Youth'. The research examines the impact of globalisation on livelihoods, education and qualifications, and on the aspirations of youth for education, qualifications and livelihoods.

The research arises from the need to monitor the impact of globalisation – operationalised via policies of economic liberalisation – on the access of the poorest social groups to livelihoods, education and qualifications in different country contexts. Economic liberalisation is changing the nature of the livelihood structure and the economic demand for skills and qualifications. It is also changing the types of educational and qualifications provision within specific national settings. These in turn impact on the aspirations of youth for livelihoods, education and qualifications. The realisation of those aspirations is increasingly conditioned by the ability to pay, as policies of economic liberalisation encourage private sector, market driven provision, especially at the post-primary level. This research explores the impacts of economic liberalisation on the structure and volume of livelihoods, education and qualifications on the one hand, and on the aspirations of youth, on the other. In particular it seeks to explore differential impacts of economic liberalisation on members of different social groups.

The fieldwork has been undertaken mainly in Sri Lanka and Zimbabwe. A smaller study was undertaken in Zhejiang Province, China and a study of UK suppliers of qualifications to Sri Lanka and Zimbabwe was undertaken to explore the interdependent, cross border nature of qualifications supply.

Research Report no 1, by Jane Evans, of the Institute of Education University of London complements the field studies by providing a review of the broader literature on globalisation and education. It takes the form of a brief review and substantial set of annotations of specific books, articles and reports.

This research was supported by DFID. The views expressed are those of the author and do not necessarily represent DFID's own policies or views. Any discussion of the content should be addressed to the author via the email address listed below.

Professor Angela W. Little  
Director  
Globalisation, Qualifications and Livelihoods (GQL) Research Project  
Institute of Education  
University of London  
[a.little@ioe.ac.uk](mailto:a.little@ioe.ac.uk)

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## **Contents**

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<b>An introduction to the annotated bibliography</b>	<b>1</b>
Introduction	1
Globalisation literature	1
Globalisation and livelihood structures	2
Globalisation and Educational Structures	3
Education and Qualification Structures	3
Globalisation and Youth	4
Conclusion	4
<b>Annotations in Alphabetical Order</b>	<b>5</b>
<b>Globalisation, Qualifications and Livelihoods Project Research Report Series</b>	<b>79</b>
<b>Other published output from the GQL project</b>	<b>81</b>

## **An introduction to the annotated bibliography**

Jane Evans, Institute of Education, University of London<sup>1</sup>

### ***Introduction***

This annotated bibliography was compiled for the DfID funded project *Globalisation, Qualifications and Livelihoods: aspirations of youth*. This project has three objectives. The first objective is to examine the impact of globalisation on livelihoods, education and qualification structures; secondly to examine the aspirations of youth for livelihoods, education and qualifications in the context of economic globalisation. A third objective is to explore the implications of the outcomes of the first two objectives for pro-poor national and international policies on education, qualifications and livelihoods. These objectives are addressed by empirical field research, but this is supported by a literature search into writing that informs the objectives and related research questions. The resulting database covers literature which meets each of the themes and objectives of the research.

The literature can be sorted into the following headings: first, literature which covers the theory of globalisation in its broadest sense; second, literature which examines the perceived effects of economic globalisation on livelihood structures around the world; third, literature dealing with the impact of globalisation on educational structures; fourth, a small literature examining the effect of globalisation on qualifications, and fifth, a literature (especially from Sri Lanka) which looks at the impact of globalisation on youth in society. A brief introduction to a small selection of the literature under each of these headings is given below.

### ***Globalisation literature***

Authors of literature about globalisation tend to adopt one of three broad positions. They may engage in advocacy, either for or against economic globalisation; or they may be sceptical about the existence of globalisation; or they engage in an analysis of globalisation.

Those authors who engage in *advocacy* about globalisation are often journalists or management consultants who write fluently for a wide audience. An example from this bibliography of an author who writes in favour of globalisation is Kenichi Ohmae (Ohmae 1990). Ohmae and writers like him are neo-liberal economists who believe that the development of human capital and freedom of trade are the solution to the social, political and economic ills of the world.

On the other side of the argument are authors like Naomi Klein whose book *No Logo* (2000) has been influential on anti-globalisation protesters. Writers like Klein take a Marxist position on globalisation and view it as a particularly harmful development of capitalism. For these authors globalisation is an economic form which exploits the poor and benefits the rich, especially transnational corporations. Klein's writing often focuses on the ill effects of globalisation on people in the developing world. Other writers like Martin and Schumann (Martin and Schumann 1997) have a more protectionist objection to globalisation and suggest that the migration of jobs and capital to poor countries will have an adverse effect on the labour market in Europe.

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<sup>1</sup> Several of these annotations are adapted from Evans, J.E. (2000) *Globalisation: an annotated bibliography for the readers of Assessment in Education*.

Hirst and Thompson (Hirst and Thompson 1996) are authors who are *sceptical* about globalisation. They demonstrate their scepticism by first setting up two ideal types: *An Inter-National Economy* and *A Globalized economy*. By showing that the conditions of the latter have not been met, they conclude that the present situation is closer to an InterNational economy. Gray (Gray, 1998) concludes that globalisation is no more than an American form of neo-liberal capitalism which will not favour all or encourage equal global economic integration. Sceptical authors take the view that globalisation is a myth created by governments and economic policy makers to justify the latest form of capitalism.

Writers like Giddens (Giddens 1990; Giddens 1999), Harvey (Harvey, 1990) and Castells (1996,1997,1998) engage with a more complex *analysis* of globalisation's causes and effects. They often draw on sociological theory and seek to demonstrate that globalisation is more than a structural phenomenon, because it is mediated by various forms of social agency. All stress the importance of knowledge in social interactions with the structural changes of globalisation. Giddens (1990) argues that knowledge and information are connecting systems in globalisation, which he defines as comprising time-space distancing, disembedding and reflexivity. (1990). In 1999 he refined his definition to observe that globalisation is a complex and contradictory set of processes. Harvey (1990) argued that the structural change leading to globalisation was "flexible accumulation". This adaptation of capital involves new labour practices and those best equipped to benefit from the change are the elites with knowledge. Castells, (1996,1997,198) argues that globalisation is "for the first time the "whole planet is organised around a largely common set of economic rules" (Vol III p.358) and that what mediates this structure can be termed "informationalism".

### ***Globalisation and livelihood structures***

Reich (1991) identifies "Three jobs of the future". These are: The routine production worker; The In-person services provider, and the symbolic analyst. According to Reich the first is in decline and the latter two on the increase, although this is an American and not a worldwide perspective. The symbolic analyst subdivides into three further job types: the problem identifier, the problem solver and the strategic broker. These jobs are those undertaken by highly educated elites.

Dicken (Dicken, 1998) surveys the effects of economic globalisation on trade, industrialization and employment. The author examines *inter alia* changes in ways of working and the effects of globalisation on employment patterns around the world, including in developing countries. An important finding by Dicken is that global restructuring and the transnationalisation of production have the effect of requiring greater flexibility in the labour market both in terms of numbers employed and the functions performed. This is similar to the effect of "flexible accumulation" described by Harvey (1990) in which there is increased outsourcing, self-employment, sub-contracting short-term contracts and part-time working. These changes alter the way women experience the labour force and this is outlined by the various chapters in a book edited by Mitter and Rowbotham (1995). Jayaweera (1994) focused on these changes in women's employment in Sri Lanka, The collapse of cottage industries and the hand-loom weaving industry sent women into factories in search of employment and these women tended to be better educated than their mothers.

Waters (1995) considers an important effect of economic globalisation to be what he terms a change from Fordism to what he terms Toyotism. Toyotism requires a numerically and functionally flexible work force, as opposed to Fordism in which low skilled employees were employed for the long term at the same task.

Martin and Schumann (1997) are concerned with the effects of globalisation on the German Labour market. These authors believe that the migration of jobs to the developed world poses a threat to employment prospects in Europe.

The National Manpower Needs Survey in Zimbabwe in 1996 found a number of skills shortages in areas that might be said to be impacted by the technological effects of globalisation, for example computing and information technology. In response to this skills shortage it was found that many establishments had introduced in-house training programmes.

### ***Globalisation and Educational Structures***

Literature about globalisation and education structures can be either literature, which recommends education policy responses to globalisation, or, about the impact of globalisation on education structures. The World Bank falls in to the former group. So for example in its *World Development Report* of 1999 (IBRD 1999), it makes a number of recommendations relating to the benefits of entering the global economy for increasing knowledge in the developing world. It recommends decentralisation and the benefits of private schools for communities. Liberalisation of the telecoms market is also urged as a way of increasing the stock of knowledge necessary to compete in a globalised world. Ohmae (1990) recommends the expansion of human capital through education systems as a means of taking advantage of the benefits of globalisation. Heynemann (2000) "argues that a vibrant private sector is an essential ingredient for an efficient public school system" (p417). In his view private sector qualification providers may be motivated by market demands to provide high quality, relevant products. Similarly Tooley (2001) aims to demonstrate that private education has a role to play in promoting equitable development and to dispel the "misconception" that private education is for an elite only.

Other authors are concerned about the effects that globalisation, especially structural adjustment will have on education structures. Stewart (1995) disputes the benefits of the human capital model for developing countries, observing a vicious spiral in which there is a reduction in state resources available for education and the consequent decline in provision disproportionately affects the poor especially girls.

### ***Education and Qualification Structures***

There is now in many countries a market for qualifications and according to Little (2000) "the supply of qualifications is a business, no different in principle from any other" (p302). She adds, "Economic globalisation influences the composition, control and locus of qualifications through the commercialisation of their supply." (2000, p 302). Part of the reason for the development of this market is an increase in demand for those seeking the greater apparent mobility and employability which international or global qualifications provide. It is Lowe's contention that "international examinations [such as International Baccalaureate or IGCSE] are increasingly being used by ...elites to reproduce their advantage in the face of growing competition and the changing economic order associated with globalisation and 'post-Fordism'" (Lowe, 2000, p 363). He hypothesises that "perceptions of changes in economic opportunities are one source of influence on decisions to take international rather than local examinations." Companies participating in the local economy may be more likely to offer the best employment opportunities to those with international qualifications. Hettige (2000, p 325) confirms this in the context of Sri Lanka noting, "those who have the resources to invest in ...foreign qualifications are in an advantaged position in the competition for private and transnational sector employment" (2000, p325) and that "underprivileged youth...are unable to compete in a globalised educational market, where the value of educational qualifications is largely dependent on the monetary investment involved" (2000, p 333). Similarly, Bennell writing about Zimbabwe in 1997 notes that a decline in public sector recruitment as a result of structural adjustment was matched by a

corresponding increase in demand for vocational training and qualifications. Many of these however are only available for foreign currency payments and thus beyond the reach of the poorer student.

### ***Globalisation and Youth***

The small selection of literature about globalisation and youth relates to Sri Lanka. They are the papers by Hettige (1996, 1998, 2000a, 2000b), which note the unsettling effect of economic liberalization on the aspirations of Sri Lankan youth.

### ***Conclusion***

This annotated bibliography represents a selection of literature about globalisation and its effects on education, livelihoods and qualifications and youth. It is also available as a web site <http://www.ioe.ac.uk/leid/gql>



## Annotations in Alphabetical Order

Ashton, David and Green, Francis (1996)

### ***Education, Training and the Global Economy***

Edward Elgar, Cheltenham

Ashton and Green identify and assess factors arising for education and training from the global economy. They formulate their assessments from an interdisciplinary, political economy position.

They start an extensive evaluation of skills formation by identifying a "simplistic consensus" that with more and better skills prosperity will follow. This consensus, they believe is connected with a similarly simplistic view about globalisation. These twin forces have contributed to make education and training paramount in the competitive process.

The authors consider deficient the assumption that there is a linear and automatic connection between skill formation and economic performance. The relationship has to be seen in a social and political context. They use the examples of the US and UK—the low-skills model; Germany and Japan—the high skills model of economic development and Asian NIE's (especially Singapore) a "third way", particular to late industrialising Confucian heritage economies.

Ashton and Green formulate a theory of skills formation. Six institutional requirements are conditional for high-level skills formation. These are:

1. Political elites that are committed to achieving high-level skill formation, together with a corresponding development of the productive system.
2. Education must produce high levels of competence in basic skills.
3. Employers must be committed to work place learning.
4. Some regulation may be necessary to ensure compliance.
5. Workers and prospective workers must be committed to the goal of skill formation and continuous learning for which incentives may be needed.
6. On the Job Training (OJT) must be complemented with Off the Job Training (Off JT).

In Japan and Germany the high skills model evolved in response to various social, political and economic factors; while in the Asian NIE's there has been conscious policy formation to achieve the high skills route. There is massive investment by the state in human resource development, as well as strong regulatory models designed to ensure compliance. Two notable features of workplace-based training were raised in the Singapore example. Firstly, qualification levels were raised by raising the bottom level of craft qualifications. (For example, there is now no equivalent to NVQ level 1 in Singapore). Secondly, pedagogically qualified trainers, like the German *Meisters*, are used for the work place training. Continuous OffJT and OJT are encouraged for all workers.

For developing countries, Ashton and Green are critical of the World Bank's liberal, human capital perspective, which currently focuses upon flexible non-formal training centres. This liberal position, they argue, isolates the education and training system from the development of the productive system, and thus from the creation of skills demands. Citing the case of Brazil, they are sceptical about whether this model will bring success along Asian NIE lines.

Avis, James; Bloomer, Martin; Esland, Geoff; Gleeson, Denis & Hodkinson, Phil. (1996)

***Knowledge and Nationhood: Education, Politics and Work***

Cassell, London

This book presents a strong critique of developments in the British education system as a response of New Right governments to economic globalisation. It raises several important questions about how the UK has directly adapted its education system, in reaction to the perceived requirements of increased globalisation in the economy, especially at post compulsory level.

Avis et al's main observation of recent policy educational developments is that they are determined by economic efficiency and the market. Human capital theories, economic nationalism and national competitiveness determine educational policy. These, they argue, have led to the spread of behaviourist and instrumentalist approaches to learning where qualifications are assessed by competence rather than knowledge and understanding. The authors argue that this amounts to a "dumbing down" and a cultural degradation.

The emphasis on skills based, rather than knowledge-based qualifications is misplaced; because the economy has a weak demand for skills, rather than a weakness in supply.

An important point which these authors make about globalisation is that national governments are ambivalent towards global markets. Thus instead of truly engaging with the global economy (in the way envisaged by Reich, for example); they cling to ideas of national sovereignty and economic nationalism. The effect of this on education systems is that people are educated to meet specific objectives of national economic competitiveness. They note the increase of economic language in the discourse of education, for example, "Value-added", "credits", Department of Education and *Employment*. They also state "the outcomes of education are perceived as tradable commodities in the job market". They note that business practice is often the exclusive resource base for Vocational Education and Training and that work place based qualifications such as National Vocational Qualifications emphasise behaviourist competence and lack support for knowledge and reflective learning. Interviews and questionnaires demonstrated that students themselves see the acquisition of post-16 qualifications as improving their position in the job market. Values such as personal growth, social cohesion and economic stability are neglected in this schema.

This book raises some important debates about the system of qualifications and its relationship to globalisation in the UK. It is strongly worded and sometimes controversial.

Bennell, Paul (1997)

***Vocational Education and Training in Zimbabwe: the role of private sector provision in the context of economic reform***

IDS Working Paper 55, Falmer, East Sussex

This is a detailed study of private sector training institutions, their development and function in Harare since economic liberalisation in 1990. Public sector recruitment was curtailed and private sector jobs were limited. There was a corresponding increase in the demand for vocational training and qualifications. The availability of Foreign exchange enabled subscription to overseas awarding bodies such as City & Guilds, Chartered Institute of Secretaries, Institute of Bankers. However the depreciation of the Zimbabwe dollar meant that these qualifications are high cost and are only available to the better off student. The growth in demand for Vocational Education and Training (VET) qualifications was seen to be a result of qualification escalation. In some jobs professional qualifications are a prerequisite for career advancement. There was a progressive privatisation of training provision at tertiary level. The existence of an informal (i.e. illegal) sector in training is examined. These offered mainly VET, notably in clothing technology, Hotel and tourism, computing etc. Recommendations include policy proposals to improve the quality and range of training provision in both the private and public sectors. There is a particular need for training for the urban poor who are neglected by public provisions and who cannot afford private provision. There should be more intervention in the private sector by the government to monitor and evaluate the standards of training.

Bennell, Paul (2000)

***The impact of Economic Liberalization on Private Sector training Provision in Zimbabwe***

Journal of Assessment in Education 7: 3 pp 439-454

This paper presents and discusses the results of empirical research into the provision of vocational training by private sector training institutions (PSTIs) in Zimbabwe. A representative sample of registered PSTIs in Harare was surveyed in early 1997. With economic liberalization during the 1990s, there has been an extremely rapid growth in the number of students enrolled on a wide variety of courses offered by registered, for-profit PSTIs. The professional and sub-professional courses offered by these institutions rely very heavily on foreign qualifications, in particular from examination bodies in the UK. PB

Blumenthal, Peggy; Goodwin, Crauford; Smith, Alan & Teichler, Ulrich (Eds) (1996)

***Academic Mobility in a Changing World: regional and global trends.***

Jessica Kingsley, London

A useful book, which examines the responses to, increased potential for academic mobility resulting from some factors of globalisation. Regionalisation is the defining thesis of this book. Regions covered include Europe, transitional Europe, North America, Asian Pacific, Australia, Latin America, The Middle East and Sub-Saharan Africa.

Most of the articles contain analysis of past and current factors affecting academic mobility in Higher Education (HE) and many policy proposals. These proposals are particularly pertinent in so far as they seek to address inequities and unevenness in opportunity for academic mobility.

The paper about Africa by Anthony Smallwood and T. L. Maliyamkomo is particularly effective in highlighting this unevenness. These writers see academic mobility as a way in which limited resources could be maximised. Regional teacher training and regional examination boards already exist and can be used as exemplars (See Bray). European experiences of Erasmus can offer useful generalisations for African countries. In particular, those schemes which deal with problems of accelerated retraining, regional development and youth unemployment. They caution against over valuation of foreign training. Certain patterns of study abroad are elitist and do not address poor African tertiary provision and contribute to a brain drain and an educational dependency culture.

More structure for academic mobility is required in Sub Saharan Africa.

Bray, Mark (1997)

***Regional Examinations councils and Geopolitical change: commonality, diversity and lessons from experience***

Conference: Education and Geopolitical Change. Oxford

Formation of regional bodies, which serve a group of countries, is a way to achieve economies of scale, greater specialisation in professional expertise, and a stronger voice in international affairs. Many advocates have particularly recommended regional collaboration to states that are too small to operate strong national bodies. However, regional bodies suffer multiple tensions and do not always meet their goals very successfully.

This paper focuses on regional collaboration in examinations, and compares the experiences of three existing and two defunct bodies. The three existing bodies are the West African Examinations Council, The Caribbean Examinations Council, and the South Pacific Board for educational Assessment. The two defunct bodies are the East African Examinations Council and the University of Botswana, Lesotho and Swaziland Schools examinations council. Although these five bodies were designed to undertake similar functions, they operated in different geopolitical environments. Instructive lessons on the nature and impact of geopolitical forces can be learned from the experiences of each body and from comparison of all five.

(Author's abstract)

Brock-Utne, Birgit (1996)

***Globalisation of Learning- the Role of the Universities in the South: with a special look at Sub-Saharan Africa***

International Journal of Educational Development **16** (4)

This article poses the question "Is it at all possible to establish a North South co-operation in the University sector of an empowering kind?"

Brock-Utne identifies a missing link, which is the link between the elites in the country and the people. In other words this is the link between indigenous knowledge and imported academic knowledge.

She argues for a transformation of the Universities of the South to include local knowledge. "The most common problems of the South can only be understood by analysing local experience." She argues that currently the social construction of a people's reality is defined elsewhere and that the solution to this would be strengthening of indigenous research based on local knowledge.

The author also poses the question "How is it possible to avoid the globalisation of learning just meaning the integration of African Elites into the culture of the former colonial masters?" Possible answers are to stop the flow from global producers to local consumers and achieve a more multi directional flow. She criticises northern universities' links with those in the South. The relationship is one-sided—a visitation of "experts" in which unequal traffic leads to loss of confidence in the southern University and a donor-recipient relationship. Students from African Universities come to study in the North but Northern Students do not study at African Universities. Professors come from Northern Universities to Africa but academics from Africa are rarely given the opportunity to teach in the North.

Brock-Utne evaluates the World Bank's attitude to higher education in Africa. The World Bank has slightly modified its original position that Universities in Africa were better closed to save money and the students sent to study abroad. It nevertheless continues to recommend severe efficiencies especially in the Arts and Humanities.

Successful strategies to remedy these inequities would be to build local capacity and reduce reliance on northern "expertise." Indigenous institutions need to be strengthened. A success story is the ALLEX programme, collaboration between the University of Zimbabwe, the University of Gothenburg and the University of Oslo. Northern lexicographers gained insights into the structure of African languages working with Zimbabweans on monolingual dictionaries in Shona and Ndebele. These dictionaries were of great importance to the mass of Zimbabwean people and the insights gained from the collaboration amounted to "help to self-help".

CSO (2000)

***Zimbabwe 1999 Indicator Monitoring***

Labour Force Survey, Harare, Zimbabwe

The report summarises the main results of the Zimbabwe 1999 Indicator Monitoring labour Force Survey (1999 IM-LFS). The major objective of the survey was to provide information on the number of people classified according to the activity status. Attempt has been made to analyse the data at national, provincial and rural/urban levels. As far as possible, the data has also been disaggregated by sex. The survey was a national representative one covering 12,495 households.

The total population was estimated at 11,969,187 persons. The number of males was 5,772,086 and the number of females was 6, 188,101. The sex ration was 93 males per 100 females.

About 8% of the male population aged 5 years and above had never been to school, while for the female population the corresponding figure was 12%. the literacy rate for males was 92 and that for females was 84.

Fifty-eight percent of the population was 15 years and above. Out of the total population aged 15 years and above, 71% was economically active. Ninety-four percent of the economically active were employed while 6% were unemployed. Most of employed children aged between 5-17 years were in the "Agriculture, forestry and fishing" industry.

The number of persons aged 15 years and above who were in the labour force (inactive population) was estimated at 2,025,165 of whom 42% were homemakers and 41% students.

The survey results show that about 20% of the total population fell ill during the month before the survey. For the currently economically active population, the age groups 20-24 and 25-29 years were most affected. Information on housing characteristics shows that 585 of households were owners/ purchasers of dwelling units they live in. Sixty-two percent of the households were staying in dwellings with electricity.



Campanelli, Pamela & Channell, Joanna (1996)

***The Conceptualisation of Qualifications by Individuals***

HMSO

An interesting and useful UK research monograph which assesses the understanding and knowledge (cognitively and linguistically) people have about the qualifications system and how they report the qualifications they themselves hold. A youth cohort sweep is researched as well as older people, young people and their parents. Age is found to be very relevant in respondents' understanding of past and current qualifications. Interview data showed variously that qualifications did not count for as much as experience in obtaining work expressed by the young unemployed and that 'qualifications opened doors to jobs' was expressed by the professional and managerial group. Those in full time education thought both qualifications *and* experience counted.

People had difficulty understanding the GNVQ and NVQ systems, or experienced problems when reporting their achievements at these qualifications. This research found that respondents might misreport, or over or under report their qualifications because: they forgot they had the qualification; they got the name wrong; they did not recognise the name or category of qualification; they disregarded or discounted qualifications they had. Conventional distinctions between academic and vocational qualifications tended to be recast considering how the qualifications were applicable to work or occupation. The example is given of an archaeology degree, which is *academic* to a person who becomes a social worker, but *vocational* to a person who becomes a conservation worker.

Useful information is included on: the construction of questionnaires; the conduct of focus groups; theoretical bases for the research and limitations in methodology, including suggestions for surveys from experience with this survey.

Castells, Manuel (1996, 1997, 1998)

***The Information Age: Economy, Society and Culture. A trilogy consisting of: Volume I: The Rise of the Network Society; Volume II: The Power of Identity; Volume III: End of Millennium,***

Blackwell, Massachusetts

This trilogy addresses changes wrought on the economy, societies and cultures by the rise of globalised information capitalism. A new world began to emerge in the late 1960's and early 1970's. Three independent processes were involved:

- The simultaneous economic crisis of capitalism and statism (i.e. the command economies of the communist bloc)
- The development of information technology;
- and the "blooming of cultural social movements" (Vol. III, p.356) (e.g., feminism, environmentalism)

These interact to produce "informationalism". For the first time in history the author says, the "whole planet is organized around a largely common set of economic rules". These are the rules of informational capitalism, characterised by increased flexibility, innovation, and "globalization oriented competitiveness". Society is also transformed by informationalism. Cultural movements interact with the social embeddedness of new technologies. Two of the institutions transformed by informationalism are labour and education. Labour can be differentiated into two categories: generic labour and self-programming labour. What differentiates these is access to education, as distinct from acquisition of inflexible skills, which soon become obsolete

Education (as distinct from the warehousing of children and students) is the process by which people, that is labour, acquire the capability constantly to redefine the necessary skills for a given task, and to access the sources for learning these skills (Vol. III, p.361)

Each volume explores the rise of informationalism. Each traces the interaction of one of the three processes outlined above with the others. Thus Volume I analyses how the information technology revolution interacts with the informational economy and creates a culture of networks and radical changes in conceptions about society, work, time and space. Volume II considers the transformation of society, politics, culture and identity in the context of a globalising dynamic. The effects on social institutions, individual identities, and nation states are drawn out. Volume III has two themes. It draws together some of the negative effects of globalisation and informationalism, such as the globalisation of criminal activity; and the polarisation, inequality, social exclusion and economic irrelevance of the parts of the world and society, which are pushed outside of the scope of informational capitalism. In this volume, Castells also examines some manifestations with implications for the state, exemplified by the Asian Pacific region, the European Union, and the disintegration of the Soviet Union. The prologue to the trilogy in volume I, and its conclusion in volume III, encapsulates the essence of Castells' major themes and preoccupations.

(Adapted from Evans, J.E. (2000))

Dale, R 1999

***Specifying globalization effects on national policy: a focus on the mechanisms***

Journal of Education Policy, 14: 1 pp 1-17

This article explores the mechanisms through which education policy is affected by Globalisation. In the introduction to the paper the author sets out his main premise namely that “globalization cannot be reduced to the identical imposition of the same policy on all countries”. However, globalization does have an effect on policy processes and policy goals in all countries and the author seeks to discover the mechanisms, direct or indirect, whereby this influence is conveyed. In the first part of the paper the author clarifies the concept of globalisation. Globalisation has “economic, political and cultural strands” but in the context of this article it is the political that is emphasised. An important concept in this paper is that the effects of globalisation are mediated by societal and cultural effects in different countries thus resulting in diverse and not homogeneous results. The main features of globalisation for Dale are that it leads nation states to become “competition states” and that they act collectively to establish “governance without government”. This phrase includes International and Supranational organisations and also a set of preferred ideologies sometimes referred to as the Washington Consensus. However countries respond in different ways to these globalising features and this is both a result of the societal and cultural effects acting form within nation states as well as the variety of mechanism through which the effects of globalisation are delivered.

The author identifies five mechanisms of delivery for globalisation. These are: “harmonization”; “Dissemination”; “standardization”; “installing interdependence” and “imposition”. He compares these with two traditional mechanisms of external effect on education policy formation “policy borrowing” and “policy learning” which he argues will persist in modified form. These mechanisms are analysed by eight dimensions of variability and a matrix is given to demonstrate the variable effects on each of the mechanisms. The characteristics of the variables are “ the nature of the relationship between the external influence and the education policy process; the scope of action, the locus of viability, the process, the parties involved, the source of initiation, the dimension of power, the nature of the effect on education, and an example from education is given for each dimension.

The main conclusion of the author’s comparison of policy borrowing with the mechanisms of globalisation is that “globalisation mechanisms are initiated outside the recipient country” i.e. in the supranational setting with its preferred ideology, but policy borrowing are initiated by the recipient country with the explicit purpose of affecting education policy formation in the country itself. Policy learning has traditionally been associated with learning “about instruments,” but now extends to learning about policy goals as well.

Each of the mechanisms is analysed in turn.

The author observes, “it cannot be assumed that for an external factor to have an effect on an education system it has to be directed towards the educational sector or even towards educational organizations” (p8) and concludes that “specifically in the field of education...the effects of globalization are largely indirect, the result of the stances adopted by nation-states in response to globalization, rather than a direct effect of globalization.”(p15)

Dale R (2000)

***Globalization and education; demonstrating a “Common world educational culture” or locating a “Globally structured educational agenda***

Educational Theory, Fall Volume 50, Number 4

This article is concerned with the relationship of globalisation to educational policy and practices. This relationship is explored with the stated aim of developing an effective theory of globalisation. Dale defines globalisation as “the changing composition of and consequences of supranational forces” (p427). The author is critical of debate which assumes that these forces have replaced the state, homogenised the world or are “driven by blind technological forces”.

For Dale a satisfactory theoretical examination of the relationship between globalisation and educational policy and practices is one which specifies the nature and force of the extranational effect; which specifies what is affected; what forms the changes take and how the effect takes place (p 427).

Two theories of the relationship between supranational forces and educational policy and practices meet the author’s criteria. These are “Common World Educational Culture” (CWEC); a theoretical approach of longstanding developed by John Meyer, and the “Globally Structured Agenda for Education” (GSAE) a theoretical approach being developed by the author himself. These are compared and contrasted and found to arrive at two different explanations for the above criteria. This is because they take different approaches to each of the criteria to be specified.

CWEC is concerned with the development of national educational systems and in particular curricula categories. CWEC is a world institutional theory which posits an international community of an international society. It examines educational policy and practice and homogeneity of curricular categories for evidence of a hypothesised world culture. Homogeneity and isomorphism in educational practice is explained thus by GSAE: “the changing nature of world capitalist economy as the driving force of globalisation and seeks to establish its effects on educational systems.” (p429).

The paper starts by contrasting the main features of each theoretical perspective. Firstly, the author notes that the two different approaches treat education differently. CWEC uses education as a resource to provide evidence for “the hypothesised world culture” (p428). In contrast GSAE treats education as a topic *sui generis*, and seeks to discover the effect of globalisation on education. Secondly, a contrast is drawn between the terms “world” and “global”. World is interpreted as connoting an “international society...made up of individual autonomous nation states,” whilst the term global “implies social and economic forces operating supranationally and transnationally”. (p428) Thirdly the term “structured agenda” is contrasted with “culture”. Culture is seen as implying a sharing of equally accessible resources whereas structured agenda implies an imposition of a “systematic set of unavoidable issues”. (p428). In the case of CWEC the culture implied is a modernising world culture based in a Western ideology of progress, justice and modernity. This rational ideology is predicated in the relationship between the individual and the state, which is legitimated through collective action and legitimated for example, through mass schooling which is central to the modernising mission of the state. CWEC as a sociological institutional theory supports the notion of universal models of education, state and society. Standardisation and isomorphism in national education systems and curricular content around the world are found because of the desire for modernisation and rationality in the institution of education.

The global structured agenda, on the other hand, implies an agenda framed by the global political community. These are powerful, shared beliefs which support the regime of accumulation and in which capitalism is the causal force. Dale summarises globalisation as “constructed through three sets of related activities: economic, political and cultural” which are respectively characterized as “ hyper-liberalism, governance without government and commodification and consumerism”. (p436). The author proposes that these activities are centred on the regional groupings of Europe, America and Asia. It is in the interest of these groupings to maintain regulations and agreements that ensure “the existence of a world that is safe for the pursuit of profit for all” (p436).

While GSAE posits a driver to homogenisation of education policy, CWEC can be criticised for its “weak theory of agency”. CWEC’s explanation “suggests that schooling spreads almost by osmosis” (p442). GSAE on the other hand has a theory of agency which focuses on the changing nature of capitalism as the driver for the globally structured agenda. In order to compete with one another, states are compelled to adopt a similar ideology educationally. In CWEC there is no such explanation for homogeneity amongst national education systems and curricular content. Dale critiques CWEC insofar as it does not question “who gets taught what by whom” an important question for GSAE.

Dalichow, Fritz (1998)

***Credit Accumulation and Transfer Systems (CATS) Conference, Derby***

Thirty papers were presented at this conference. Contributions covered "the past and current state of the art of credit accumulation systems, credit transfer systems and CATs in their institutions, regions and countries, in the UK, Europe and in the World". The main emphasis is on the function of credit accumulation systems within different countries particularly in Europe. Five papers deal with European Credit Transfer Systems (ECTS) and one-"CATS, Academic and Professional Recognition on a World-Wide Scale?" by Fritz Dalichow proposes a system of credit transfers and professional recognition which could be recognised around the world wherever institutions were prepared to embrace the principles. The author of this paper notes the cultural and linguistic barriers which would be encountered in a scheme of this kind, but remains optimistic about the possibilities. In Europe academic recognition is inherent in the ERASMUS and SOCRATES programmes.

Dibaja, Zuhair (1997)

***Globalisation: the last sky***

European Journal of Development Research, **9:1**

Although written in a challenging and polemic style; this article contains an important point. This is that in most accounts of globalisation only the Western and probably East Asian views is given. Other cultural perspectives—especially Islam, which has a worldwide cultural influence—are neglected or absent.

Dicken, Peter (1998)

***Global Shift: transforming the world economy***

Paul Chapman Publishing Ltd., London

This book gives a useful overview of the effects of economic globalisation, especially on patterns of trade, industrialisation and employment. It is presented as a textbook, but does not simplify or neglect some of the complex issues of globalisation. The variations and uneven effects of globalisation are well examined. Of particular note for research on globalisation, qualifications and livelihoods are Part III: *The Global Shift: the Picture in Different Sectors*, which examines in detail the effects of globalisation on 4 different economic sectors: the textile and clothing industry, The automobile industry, the electronics industry, and the internationalisation of services. Each of these case studies ends with a section on jobs in the respective sector. Part IV: *Stresses and Strains of Adjustment to Global Shift*, contains a chapter on *Making a Living in the Global Economy*. This section asks 'Where will the jobs come from?' It compares the employment issues affecting the older industrialised countries with those which affect the Newly Industrialising economies and the economies of the developing world. Dicken notes that the structure of employment opportunities is altered by globalising processes but points out the importance of internal economic variations and cyclical forces as well.

Ideas of the world economy consisting of 'core' and 'periphery' areas are less useful as the global economy is multipolar and formerly peripheral areas are now dominant industrial centres, for example, the East Asian tigers

The section on the *Problems of Developing Countries in a Globalizing Economy* is informative for this research. Dicken identifies the basic problem as being poverty and a lack of adequate employment opportunities. There is a widening gap between rich and poor countries and large disparity of income within countries between urban and rural areas. Furthermore labour force growth outstrips the growth of jobs, because of rapid population growth particularly in urban areas.

In developing countries the distinction between formal and informal employment sectors is often blurred. Because of the fluid nature of the informal sector it is difficult to measure unemployment in the same way as in the developed world where the formal sector of secure wage labour dominates. Dicken concludes from these factors that underemployment is more of a problem in the developing world than unemployment.

The effect of urban migration is to create a vicious circle. There is more industry in the urban areas because labour is easier to come by; this attracts people to the urban areas in numbers, which exceed the employment opportunities, contributing to the explosive growth of urban populations and poverty. Pressure is reduced to some extent on local labour markets by legal and illegal migration abroad for work. However, those who acquire valuable skills and vocational training abroad are least likely to return home.

Dicken includes a table showing the positive and negative effects of globalisation on employment in developing countries. Some of the advantages are: export generated income promotes investment; there can be employment growth through an increased employment sector; exposure to new technology via transnational corporations leads to upgrading and increased value added. Amongst the disadvantages are: an insufficient increase in employment and earnings to reduce inequality; reallocations in either direction can have disruptive social effects, and international firms can impose unfavourable terms on weak bidders desperate for the employment opportunities. Dicken concludes that globalisation is a double-edged sword. Policy aims for employment should be sustaining growth and ensuring equity in the newly industrialising economies and ensuring survival and reducing poverty in the least industrialised countries.



Evans, J (2000).

***Globalisation: an annotated bibliography for the readers of assessment in education.***

Journal of Assessment in Education **7:3**

This paper takes the form of an annotated bibliography providing a synopsis of the work of some influential writers on globalisation, and presenting an indication of the wide-ranging nature of debate in the field. The selection of works is intended to inform and interest readers with a background in education and assessment.

Author's abstract

Gedal, Stuart & Gracia, Susan (1995)

***Credentials Evaluation in Healthcare for Immigrant Workers***

World Education Inc., Workplace Learning Programmes

This paper was presented at the Warwick conference (see Dalichow, Fritz). World Education Inc. is a not for profit organisation providing training services in the US for educationally and socially disadvantaged groups. Work place education was started in 1989. The focus of training programmes was on teamwork, technology and cultural diversity. As a result of this work in a health care setting the organisation identified a mismatch between the skills needed in the work place and the skills possessed, but also a national shortage of skilled Healthcare professionals. Demand for skilled workers outstripped the supply. However many immigrant workers in hospitals had qualifications from their home countries which overqualified them for the work they were Undertaking—typically domestic or services. Research in the Brigham and Women's hospital in Boston identified 560 employees with allied health, nursing or medical training from a country outside the US. Forty per cent were working in jobs for which they were overqualified. It was found that these workers continued in low pay, low skill jobs because of the opportunity costs of retraining. Strategies were devised to address these workers needs and fill the hospital's skills shortages. For example, recruitment, training and careers advice materials were produced in Hispanic languages to attract suitably qualified people when they started work in the hospital even when they had no English language training. Project step-up provided an access-type training programme to raise skills and confidence to university levels. High School Equivalency Certificates were offered with education especially in sciences and maths, for health care workers. Individualised programmes were provided where required.

The Credentials Evaluation Programme was researched over three years and the research process is described in detail with appendices. The aim of this scheme is to match skill shortages with skills and qualifications, which closely match the US licensing requirements. Other countries' healthcare training programmes were analysed in depth. Workers were then able to make up differences in their education rather than retrain from scratch to gain US qualifications. More emphasis was given to on the job internships so that clinical experience could be added to credentials and enhance their equivalence to US degrees.

This research demonstrates that careful evaluation and comparison of qualifications from other parts of the world, enabled workers to upgrade their employment prospects and meet skills shortages. This is of interest to research considering the increase in migration arising from globalisation; credit transfers, and the marketisation of qualifications.

Giddens, Anthony (1990)

***The Consequences of Modernity***

Polity Press, Cambridge UK

Giddens describes this book in the preface as “an extended essay”. It is highly discursive in character. Giddens presents his interpretation of modernity and its consequences in the late 20th century, but challenges views which posit the emergence of post-modernity (see for example, Harvey). He develops an alternative position of "Radicalized Modernity" and provides a table of comparison to support his position. For the purposes of research on globalisation, ‘radicalized modernity’ has two pertinent features:

- (i) High modernity, which is a set of circumstances in which dispersal is dialectically connected to profound tendencies towards global integration.
- (ii) That “co-ordinated political engagement” is both possible and necessary on a global level as well as locally (see also Held)

Section II of this book deals with *the Globalising of Modernity and Dimensions of Globalisation*. Giddens sees modernity as inherently globalising. This process is driven by “three sources of the dynamism of modernity”: time-space distanciation; disembedding, and reflexivity. These arise from the interconnected nature of the four institutions of modernity: Capitalism; Industrialism; Surveillance, and military power.

Giddens examines two theoretical perspectives of globalisation:

- (i) Wallerstein’s world systems theory, which, he concludes, fails to address political or military connections through its concentration on economic influences.
- (ii) International relations theories, which he asserts neglect the points at which social relations crosscut state boundaries.

Giddens develops dimensions of globalisation, which seek to remedy these lacunae. He shows how the world capitalist economy, the international division of labour, the nation-state system and world military order are distinct but interconnected in globalisation. The connecting systems are knowledge and information.

Giddens defines globalisation as

The intensification of world-wide social relations which link distant localities in such a way that local happenings are shaped by events occurring many miles away and vice versa.

This is an important definition because of the way in which it overarches the individual defining events and agencies of globalisation and stresses the inevitability of this dialectic in a modern world. While reflexivity demands we attend to these events of time-space distanciation, their disembedded nature makes globalisation into the Juggernaut we must learn to ride in Giddens’ account in Section V.

In section V *Riding the Juggernaut*, Giddens pursues his arguments in the direction of controlling and using the consequences of modernity, including globalisation, beneficially. After modernity he envisages a post-scarcity system of global co-ordination which transcends the flaws of both capitalism and socialism. This takes the discussion beyond the realities of policymaking and while intellectually interesting, begs many questions about population, consumption, resource allocation and environmental pressures.

In his final section, Giddens reflects on Modernity and Globalisation as Western projects. These are important considerations to acknowledge, especially in the context of international development and for countries in the post-colonial world.

Giddens, Anthony (1999)

**Reith Lectures. Runaway World**

BBC, London, Delhi, Hong Kong, Washington DC

These lectures were given in the tradition of Reith lectures and broadcast on the radio by the BBC between April and May 1999. In keeping with the themes of globalisation and a runaway world Professor Giddens gave the five lectures from four cities. The first was broadcast from London, on the topic of *Globalisation*. The second lecture was on the subject of *Risk* and was broadcast from Hong Kong. The third on *Tradition* was given in Delhi. The fourth on the *Family* was broadcast from Washington DC, and for the last lecture on *Democracy* Giddens returned to London. A web site was hosted on the Internet giving the written form of each lecture, which with the right software could also be played back on sound and video. Professor Giddens invited Internet users to comment and reply to the topics by e-mail and these e-mails from around the world were also posted on the web site.

A brief annotation of each lecture follows:

**Globalisation**

Giddens observes that we live in a world of transformations and that there is some difficulty understanding the term globalisation despite its widespread use. He gives a brief description of the sceptics' position, which he associates with the old left. He goes on to give a simple explanation of the radical position (for example, Kenichi Ohmae). This is the position closest to his own. However, it is a mistake to see globalisation in purely economic terms. Globalisation is also political, technological and cultural. He uses American figures to demonstrate the rapid increase of media technologies in recent years, compared with the slower take up of the past. He considers the collapse of the Soviet Union to have been a response to global media—a television revolution.

Globalisation is a complex and contradictory set of processes. It pulls upwards and pushes downwards. Quoting from Daniel Bell he concurs with the observation that the nation becomes too small to solve the big problems and too large for the small ones. New economic and cultural zones are created which transcend national boundaries. There is also a revival of local cultural identities. Giddens feels able to contend that nations no longer have enemies, following the end of the cold war. To support this he gives the examples of Britain, France and Japan.

He acknowledges that globalisation is not even handed and that the effects might be interpreted as "Westernisation" given the dominance of the American economic, cultural and military position in the global order. Globalisation creates a world of winners and losers, but he argues that globalisation is only partly Westernisation because of what he calls "reverse colonisation" meaning the influence of non-western countries on the West. Globalisation is "a shift in our very circumstances. It is the way we now live".

**Risk**

The concept of risk is one, which only dates back to the 16th or 17th century. Originally it meant the risks of sailing uncharted waters and then became applicable to banking and money lending and borrowing activities. The notion of risk is connected with probabilities and uncertainties and can only be in wide usage in a society, which is future oriented. Giddens says, "Risk is the mobilising agent of a society bent on change". Its continuous calculation is the basis for modern capitalism.

Giddens identifies two types of risk: Firstly, external risks arising from fixities of tradition or nature and secondly, manufactured risk, for example, global warming. This means worrying less about

what nature could do to us and more about what we have done to nature. Social institutions are also subject to more risk. Giddens gives the example of marriage. The management of risk is one of the tasks of government and there is a fine balance between over and underplaying risk.

### **Tradition**

Giddens observes that tradition is often invented and that it is a creation of modernity. Tradition “defines a kind of truth” Tradition is distinguished by repetition and ritual rather than by existence over a long period of years. Traditions are the property of groups not individuals. Enlightenment thinkers were prejudiced against tradition, but for Giddens they only partly succeeded in destroying it.

The effect of globalisation is to open up traditions and to detraditionalise traditional societies. This is at the core of the cosmopolitan global society which Giddens sees emerging.

The changing role of tradition has a new dynamic in globalisation. These are: the push and pull between autonomy of action and compulsiveness; and between cosmopolitanism and fundamentalism. Fundamentalism is the child of globalisation “edged with the possibility of violence and it is the enemy of cosmopolitan dialogue”. In conclusion Giddens acknowledges that fundamentalism poses the question “can we live in a world where nothing is sacred?” Moral commitments and universal values are still necessary in a globalising world.

### **Family**

The family is a site and a metaphor for the struggles between tradition and modernity. In this lecture Giddens introduces some key ideas about social institutions the family and marriage in particular. The idea of relationships and “coupling” and “uncoupling” are more accurate representations of personal life today. Children are valued more highly because they are “rarer” than in previous generations. Decisions to have children are based on personal circumstances, whereas traditionally children were of economic benefit. Giddens believes that what is happening in the West will take place in more traditional societies as well. The equality and education of women are central to democracy and fulfilment and happiness. This is why the traditional family must be changed.

Giddens goes on to discuss an abstract idea of relationships: This is the “pure relationship”, which is based on an ideal of emotional communication and equal rights. This is contrasted with traditional families where ties were based on economics or an unequal distribution of social power. The pure relationship is democratic and based on open dialogue. Gays have been pioneers in establishing new forms of relationship.

Giddens concludes nonetheless “the protection of children has to be the primary feature of legislation and public policy”. Parents have an obligation to care for their children until adulthood no matter how far from the traditional family their relationships might be.

### **Democracy**

The spread of democracy has been strongly influenced by the advance of global communications. It has gained energy throughout the 20th century but most rapidly since the 1970's. Giddens gives a standard definition of democracy consisting of a system having effective competition between political parties; free and fair elections at regular intervals; a full franchise, and freedom of expression and freedom of association.

There are different levels of democratisation. The paradox of democracy is that although many states aspire to and emulate the western model of democracy, in mature Western democracies there is disillusionment with the processes. Democracy needs to be democratised, through an effective devolution of power, effective anti-corruption measures, constitutional reform and

greater transparency. Political parties should note the tendency especially amongst the young to gravitate towards single issue rather than party politics. Political parties would do well to foster collaboration with single-issue groups and help to bring about a strong civic culture. Like a three legged stool government, the economy and civil society need to be in balance or democracy topples. Democracy must be fostered above the level of the nation state to remedy the democratic deficits of the nation state, for example in dealing with ecological and environmental issues. A supranational organisation like the EU is more suited to this purpose than an international organisation like the UN. The EU however is also in want of democratisation. The runaway world needs more not less government “and this, only democratic institutions can provide”.

GOZ (1998) IMPREST:

***Zimbabwe Programmes for Economic and Social Transformation 1996-2000***, Harare, Zimbabwe

The report notes the remarkable progress Zimbabwe made towards creating an equitable society inclusive of democratic socio-political structures, since independence. However, slow economic growth and unequal distribution of the benefits of that growth have meant that too many Zimbabweans remain ill equipped in terms of the resources and opportunities to create a better life for themselves and their children. It was clear according to the report, that strong social policies pursued since independence will not deliver the improvement in well being of the Zimbabwean people without much more rapid growth in opportunities for productive employment and overall economic empowerment.

According to the report, the potential for achieving this growth exists, but realising this potential requires a deepening of, and extension to the reforms under Economic Structural adjustment (ESAP), whose strength and weakness provided important lessons for the future. This gave birth to the Zimbabwe's Programme for Economic and Social Transformation (ZIMPREST), which tries to offer the basis for policies to meet the challenges and opportunities of the future.

Overall the objective of ZIMPREST is to bring about an adequate and sustainable rate of economic growth and social development to reduce poverty and create the basis for all Zimbabweans to provide a better life for themselves and their children. Among the many conditions that are necessary to meeting this objective none would be possible without rapidly expanding opportunities for employment. The demographic realities confronting Zimbabwe require a quantum change in the employment generation performance of the economy. ZIMPREST, therefore, was to usher in new policy changes, which encourage the use of labour intensive technologies, as well as market friendly initiatives to enhance access to productive resources by a larger part of the population.

Meeting the basic objective of generating economic growth, employment creation, entrepreneurial development, economic empowerment and sustainable poverty alleviation also requires a comprehensive restructuring of Government, so that it can achieve its targets, economic and efficient delivery of key services as well as better facilitate economic empowerment and private sector development.

The report notes that durable success can only be achieved in the context of strong and sustainable economic growth. This in turn requires a profound change in the nation's investment performance. Given the limited size of the national market, it also necessitates policies that facilitate access to the efficiency gains an output expansion that come from full integration into the regional and global economy. Most importantly, it requires fostering and entrepreneurial culture across society and investing in human resource development to give people the skills required to improve productivity and to acquire a meaningful stake in economic development. Given the size and complexity of the task ahead, Government acknowledges that neither itself nor the private sector alone can meet the challenge. As a way forward the report encourages the strengthening of partnerships that have been established in society so that each sector of the nation can concentrate their initiative and resourcefulness on what they can do best.

The basic requirements to meet economic growth targets and also to make inroads into the current pool of unemployed and underemployed according to the report are: a consistent reduction in the government budget deficit; a sustained improvement in investment performance, and continuous growth in exports.

Through ZIMPREST, the concerns of growth and equity which remain at the heart of Zimbabwe development policies will be addressed so that Zimbabweans, especially the historically



marginalised sectors among the indigenous people, can secure a meaningful livelihood amidst the challenges of globalisation, HIV/AIDS and recurrent doubts.

GOZ (2000)

***Zimbabwe Millennium Economic Recovery Programme,***

Harare, Zimbabwe

The Zimbabwe Millennium Economic Recovery Programme, Harare Zimbabwe is a multifaceted response to the current fundamental imbalances in the macro-economic environment. The vision of this economic recovery programme is to mobilise all national stakeholders namely government, business, labour movement and civil society to implement a package of synchronised macro-economic stabilisation measures, which will be both anti-cyclical and anti-inflationary. The prime objective of this programme is to remove the fundamental causes of inflation and restore macro-economic stability in order to create an economic environment conducive to low interest rates and, hence, sustainable investment, stable real incomes, as well as poverty mitigation.

This Programme builds on fiscal policy adjustment commitments made by the government during ESAP (1991-1995), ZIMPREST and the Millennium Budget announced on October 21, 1999. It is designed to strengthen the attainment of fiscal adjustment and economic reform policies made in good faith with co-operating partners. It is hoped that the use of well co-ordinated policy instruments as well as realistic targeting and sequencing of the reform process is bound to support a sustainable and enthusiastic implementation process.

The first phase of the reform programme emphasised external trade liberalisation, deregulation of the public transport sector, and promotion of private participation in economic activities. However, ESAP and IMPREST failed to effectively restructure and reform the civil service and parastatals, which directly contributed to unstable budget deficits. Financing of these deficits by domestic borrowing led to high inflation and interest rates, deteriorating balance of payments and depletion of international reserves. The shortage of international reserves, coupled with speculative tendencies, weakened the Zimbabwe dollar and reduced the country's credit rating which made it difficult for the government and the private sector to raise funds from international markets.

In order to arrest a further deterioration in macro-economic fundamentals, Government needs to speed up structural reforms, without any further delay. the prime objective of restructuring Government functions will be to match associated expenditures of programmed Government functions and other spending decisions with available resources Presently the country is heavily indebted, and therefore a prudent course of action would be to reduce the stock of both domestic and foreign debt. Any further borrowing could be directed at financing the restructuring, and for productive purposes.

In brief the objectives of this economic recovery programme are to:

- Consolidate the fiscal adjustment policies
- Accelerate and complete the Public Enterprise Reforms
- Stabilise prices at lower levels
- Stabilise the value of the Zimbabwe dollar and resolve the foreign currency crisis
- Deepen the financial sector reforms
- Stimulate the growth of the productive sectors

- Build confidence
- Protect vulnerable social groups
- Establishment of implementation, accountability and monitoring institutions.

Gray, John (1998)

***False Dawn: the delusions of global capitalism***

Granta, London

This is a strongly asserted critique of the idea that free-market neo-liberalism is a good thing and should therefore be exported globally. Gray examines the effects of free-market laissez-faire capitalism in Mexico, the UK and New Zealand. He concludes that it leads to the development of a large socially excluded underclass, an increase in political corruption (and in Mexico, political instability), and damage to social cohesion.

According to Gray, free market capitalism is essentially an American project and is harmful in its exported form. Indeed Gray does not find that it benefits America. Rather it leads to an increasing gap between rich and poor, social exclusion and the destruction of social institutions. In the chapter *What Globalisation is Not*, Gray disputes the perception that globalisation is “equal integration in worldwide economic activity” and that all forms of capitalism will converge towards the “Washington Consensus” on free-market neo-liberalism. He criticises the “unreasonable pursuit of economic efficiency without regard to social cost” and seeks to demonstrate that the mobility of global capital leads to a downward pressure on wages especially for the low skilled. This is partly driven by massive population growth in developing countries leading to transnational corporations locating to regions where labour is abundant and cheap. In chapters on post-communist Russia and Asian capitalism Gray demonstrates how alternative capitalisms develop, succeed or fail according to unique historical and cultural antecedents which have no relation to the American project based in the Enlightenment. Gray concludes that a global economy is being created by the “worldwide spread of new technologies” not “by the spread of free-markets”. The spread of new technology cannot be resisted but does not lead to global integration or harmonisation, but instead to anarchy, conflict and danger. Gray is ultimately pessimistic. From the point of view of research in developing, non-European countries Gray's thesis raises vital questions about the appropriateness of the globalisation project as an economic and political model. He particularly notes the dilemma of countries with no effective state in the face of exhortations to minimise government.

Green, Andy (1997)

***Education, Globalization and the Nation State***

Macmillan, Basingstoke

A collection of articles exploring the way the nation-state has traditionally used education as an instrument to promote national and cultural identities. The history of the role of education in state formation is examined. Changes in national and cultural identities, especially since 1989, mean that this link is weakened with implications for the nature and purpose of education systems. Green interrogates the challenges to national education systems posed by post-modernism, regionalism, changing cultural identities and globalisation. For the purposes of our research his interpretation of the defining features and impacts of globalisation is important. This is contained in the final essay: 'Education, Globalization, and the Nation-State'. Green seeks to remedy what he sees as a lacuna in many accounts of globalisation by providing an historical background, which traces the European antecedents of the sovereign nation-state. Green gives a comprehensive historical background of the support of nationalist projects through education in the Western world. In the post cold war period the identification of national interest became less to do with citizenship and national cohesion and more to do with national economy and economic competitiveness. This is a significant observation for any research connected with education and livelihoods. For developing countries the school is the central locus for both citizenship formation and national economic development. Green cites the Asian Tigers as notable in their success in these respects and studies the case of Singapore in depth, especially the role of the state. Green assesses the relevance of extreme models of economic globalisation, (such as those espoused by Reich and Ohmae) for national education systems. Green provides a critique of both political (Held) and cultural paradigms (Pieterse and Robertson) of globalisation. He agrees with Hirst and Thompson that these extreme models are theoretically overdrawn and conceptually thin. Green queries the thesis that globalisation and post-modernism have rendered traditional educational goals obsolete. The evidence suggests a partial internationalisation of education systems, rather than a full-scale globalisation. Increased porosity in national systems has led to exchange and interpenetration of policy and ideas.

The expansion of virtual education through information and communication technology is limited at the lower grades because of the basic human needs of children for adult care and supervision. Green outlines some of the recent changes in European qualification routes designed to meet multiskilling and flexibility needs. There are trends towards assessing broader based vocational and technical competencies rather than narrower specialist occupationally based courses. Training partnerships with industry are apparent across Europe. Competence based modular approaches and Accreditation of Prior Learning are encouraged by the EU. However, cultural divergence in education systems is still of note. Green notes the failure to date of the EU in its attempts to harmonise vocational qualifications. The nature of economic globalisation has led the pressure of competition to bear down on education systems. The emphasis is on skills formation and economic performance. In the final analysis Green contends that governments still have control over national education systems, notwithstanding the change in the balance of priorities from social to economic.

Green, Andy; Leney, Tom & Wolf, Alison (1997)

***Convergences and Divergences in European Education and Training Systems. Research project for the EC Directorate -General XXII Education, Training and Youth***

Institute of Education, University of London

This report examines areas of convergence and divergence in the education and training systems of the European Union. The Executive summary of this report clearly sets out the various findings related to different levels of education and training in member states.

The effects of globalisation on European education and training systems are covered under the heading Internationalization and Economic Restructuring. Internationalization is seen as a continuation of past trends. However, there is an accelerated pace. The communications revolution means that international exchange and trade in knowledge and ideas has increased. Transfer of knowledge is the key to acceleration in industrialisation. The scale and impact of multinational enterprise is noted.

The European education policy response to globalisation has been to "to move further into the knowledge intensive, high value added areas of production and services", rather than "trying to compete with the low wage, low cost economies around the world". In this context a decline in low-skilled jobs and a relative increase in high skilled employment was noted. Employment has become functionally and numerically flexible.

New skills requirements are flexibility, new types of knowledge-for example a greater emphasis on analytical and conceptual skills. Learning to learn and to think creatively in groups may be more important than specific vocational skills. "After several decades when priority has often been given to the role of education in economic competitiveness, there is now a growing awareness of the importance of the civic role of education and training institutions". An example of the way this impinges on qualifications and school to work transitions can be seen in the erosion of apprenticeship schemes. Traditionally, apprenticeships are seen as a fairly inflexible preparation for specific occupations, which, in the changing labour market may disappear. A need is seen for "transversal skills and broadly applicable theoretical knowledge." Continuous in-company training has also had an effect on apprenticeships.

Alternance is in-company training leading to a qualification. The qualification is achieved through a combination of college and work place based learning.

Participation in either of these work-based schemes may depend on young people's observations about the probability of gaining employment with the qualifications obtainable. These perceptions vary according to local employment levels. Of significance for developing countries, which compete in a global labour market, is that

It is no longer appropriate to see education and training as a stage in people's lives, undertaken before they enter the work place; but rather as something which is a lifelong enterprise.

Ideas of lifelong learning are viewed favourably by EU states and one role of lifelong learning is seen as addressing exclusions and basic skills lacks.

A striking change is noted in the move of adult education away from general education and towards adult vocational training, reflecting anxieties about the global economy. This may also be a response to government funding policies, which favour courses that are described as vocational.

Overall, although there are different ways of managing policy responses to globalisation across the EU, concern about the global labour market and human capital issues predominate.

Hallak, Jacques (1998)

***Education and Globalization IIEP Report No 26***

IIEP/UNESCO, Paris

This paper was presented at a conference at the University of Bristol "Educational Reconstruction and Transformation: Challenges for the 21st Century" the author sees globalisation as an economic phenomenon which affects the social, political and cultural. The paper connects with concepts arising from the Jomtien declaration.

Globalisation is defined as the "free exchange of goods services and capital". The author also argues that it is an historical and evolutionary process

Globalisation has consequences for political organisations at 3 levels;

- 1) The supranational
- 2) The infranational
- 3) The national

The teachers of the future will be "brokers in the information society". Issues around certification are considered. In the light of the internationalisation of skills Hallak proposes a qualifications authority. He notes the erosion of state power over education. Hallak considers education in the market and education as a market. The author discusses the dangers of economism, wherein the language of economics enters the "everyday vocabulary of the education profession, as if schools... were firms selling learning" The author considers this to be part of the erosion of the distinction between private goods and public goods.

Harvey, David (1990)

***The Condition of Post Modernity: The political-economic transformation of late twentieth century capitalism***

Basil Blackwell, Oxford

This book section is valuable in that it presents the problematique of flexible working in the theoretical context of postmodernism and as a possible response to Fordism. Harvey is a geographer, writing from a post modernist perspective, which is informed by the principles of Marxism. He begins the section with a chapter on Fordism, describing the history of its development and the effect on labour practices. He acknowledges the inequitable results of Fordism. He sees Fordism as "less a mere system of production and more a total way of life". In order to deal with difficulties inherent in Capitalism, Fordism has to exert repression, habituation, co-optation and coordination-operation throughout society. This has implications for the design of schooling systems and curricula. State and public interventions developed in response to Fordism and its attendant market failures in the form of Keynesianism. The greatest divergence between the promise of Fordism and its realities were apparent in the Third World.

Harvey's second chapter deals with "flexible accumulation" and the changes wrought on patterns of work and employment. Flexible accumulation is an adaptation of capital in response to the dysfunctional rigidities of Fordism; especially those exposed by the oil crisis of 1973. "It rests on flexibility concerning labour processes, labour markets, products and patterns of consumption." There is increased outsourcing, self-employment, sub-contracting, short-term contracts and part time working. This has particular effects on the employment of women; more women than ever before are in the labour market and opportunities provided by flexible employment have advantages for many. However they also, Harvey argues, make it easier to exploit the labour-power of women. Other practices emerge or re-emerge to take advantage of women's flexibility. For example, self-employment, paternalistic family firms, home working and sweat shops. Many of these are also notable for their exploitation of immigrant labour. Ultimately the greatest bargaining power and employment advantages go to those with knowledge, which becomes a key commodity in itself. These changes in ways of working have been accompanied by a massive expansion in the global financial system following the breakdown of the Bretton Woods system in 1971. This is the most important feature of the change from Fordism to flexible accumulation for Harvey.

In a chapter on *Theorizing the Transition* Harvey provides several useful tables which outline the contrasts and results of changes between Fordism and Flexible accumulation. He lines up the new theoretical perspectives with Marxist views of capital-labour relations. Harvey concludes that Marxist analysis is still a useful tool for assessing capitalism although capitalism has changed beyond recognition.

Harvey concludes that inequalities are still an inherent part of capitalism and the new labour practices continue to privilege an elite especially those with knowledge.

Hettige S.T. (Ed.)(1996)

***Unrest or Revolt: Some aspects of Youth Unrest in Sri Lanka.***

Goethe - Institut - Colombo American Studies Association, Sri Lanka

The first edition of the present collection of essays was published in early 1992 following the two-day conference on the subject of Youth Unrest in Sri Lanka held in Colombo in 1991. The topic was considered very significant at the time as it was only a year earlier that the security forces crushed a long drawn - out Youth rebellion in southern Sri Lanka led by the People's Liberation Front (JVP). While there have been different views expressed on the nature of the rebellion and the intentions of its leaders, as acknowledged even by the Presidential Commission of Enquiry on Youth Appointed in 1990, the vast majority of rural Youth who participated in the rebellion were motivated to do so by a deep sense of deprivation, hopelessness and social injustice. It has also been widely recognized that unfulfilled aspirations, growing social inequalities, and declining moral and ethical standard in society have infuriated many youth as such development stood in sharp contrast to what they were encouraged to value and idealize by liberal education institutions and humanistic political and social philosophies which they were exposed to through political parties, mass media and formal education. The widespread popular perception at the time that there was a steady rise in corruption in public life and a devaluation of democratic institutions over the years seemed to have contributed to the loss of faith in the political establishment on the part of rebellious youths.

The suppression of the southern rebellion in the late 1980s delivered a severe blow to radical youth politics in the south, in particular the activities of the JVP. However, the election of a new, left of center government in 1994 has once again created considerable democratic space for youths to engage in politics. The JVP itself is engaged in democratic politics, as did other youth political groups in the south. On the other hand, the main separatist group in the North is still engaged in the armed conflict with the Sri Lankan security forces. So at the time of writing there were no clear signs of a possible negotiated settlement to the conflict. All the indications were that militant youths would continue to play a critical role in public affairs in the country in the years to come. What shape their politics is going to take would depend not only on how accommodative the economic, social and political institutions become but also how readily the youth activists would learn from their own experience.

On the economic front, radical restructuring of the economy after 1977 has been a significant source of anxiety and frustration for underprivileged youths aspiring to social mobility. The widening gap between rural and Urban areas in terms of economic distribution and consumption patterns and the inability of youths from lower strata to successfully compete for privileged positions within the emerging social order have had an adverse impact on the morale of many a rural youth. The inadequacy of existing state interventions as is clearly evident from the poor quality of education and training provided in rural schools and state Universities, has also made a distinct contribution to their sense of deprivation.

Rapidly growing social inequality in recent years have also contributed to the frustration of youths who have long been committed to egalitarian ideologies that most established political parties have vigorously advocated after independence. Inadequate and ineffective social policies aimed at narrowing such gaps have made a situation worse. The declining moral and ethical standards and the weakening of the human bonds in society have not helped in promoting contentment among socially conscious youths. The disregard of such standards displayed even by many of those who are supposed to uphold and nurture i.e. spiritual and civic leaders, and the complacent attitude adopted by many others, have not given much hope for those who wish to promote social justice and the civilized existence.

The above tendencies have facilitated the emergence of power seeking individuals/groups committed to diverting energies of disgruntled youths into campaigns that have potential of impeding even the entire process of social and economic development of the country. So, it is



the responsibility of the social scientist to draw the attention of the policy makers to such underline courses of youth rebellion and emphasize the need to formulate policies and programme that helped check the tendencies mentioned above.

Hettige S.T. (Ed.) (1998)

***Globalization, Social Change and Youth***

German Cultural Institute, Colombo.

The papers appearing in the present volume were presented at a seminar on "Youth in Transitional societies" held in Colombo in October 1996. The main objective of the seminar was to examine how the socially and politically significant youth constituencies in Sri Lanka and East Germany were responding to the changing politico-economic circumstances following far reaching economic reforms implemented in Sri Lanka since the late 1970s, and, in the case of Germany, since the time of unification.

When a protectionist state gives way to market forces, allowing the latter to guide to a great extent the allocation of resources and distribution of life chances, the changes that follow can naturally be far reaching. The latter tend to affect all aspects of society. Such a state of affairs can be described as one of transition. The focus of the seminar upon which the present publication is based has been on the position of youth in such a transitional setting. The papers appearing in the present volume deal with different aspects of the issue at hand. How are they affected by the changes? How do they respond or adapt to the emerging situation? What kind of behavioural and normative changes impinge on the lives of different segments of youth?

The above are some of the questions that have been dealt with in the papers that follow. The papers explore these questions in relation to certain specific social, economic, political and behavioural phenomena - such as peasant agriculture, migration and displacement, social structural change, political ideology, sexual behaviour, globalization, social and cultural identity and political culture. These diverse aspects are not dealt with in any particular order or combination in the papers appearing in the present volume.

One of the underlying themes of the present collection is the proposition that Sri Lanka's integration into the global system in recent years has induced changes in many spheres, both directly and indirectly. Yet, the book does not represent an exhaustive analysis of all aspects of change. Nevertheless, the essays that follow survey the main trends thereby pointing to the directions in which Sri Lanka's youth constituencies appear to move in line with the challenges and opportunities they are faced with, both real and perceived.

Hettige, S.T. (2000)

***Economic Liberalisation, Qualifications and Livelihoods in Sri Lanka***

Journal of Assessment in Education 7(3): 325-333.

Sri Lanka experienced a rapid expansion of population in the first few decades following Independence in 1948. Population growth far outstripped the rate of growth of the economy, which remained mostly dependent on primary production for export and domestic consumption. Introduction of universal free education pre-dated political independence and led to rapid school enrolments. In a slow-growth economy, dominated by state enterprises, education became the main avenue of upward mobility for many underprivileged young people. Increasing competition for education and white-collar employment in the then dominant state sector in the 1960's and 1970's necessitated policy interventions that were not necessarily fair to all competing social and ethnic groups.

In the late 1970's, the policy focus shifted from education to liberal economic reforms aimed at generating economic growth and employment creation. Early gains in terms of economic expansion were slowed down by the ethnic conflict that erupted in 1983 and continues to retard economic development in the country. While the affluent strata continue to gain from the open economic and liberal educational environment in terms of income and lucrative employment opportunities, many young people from lower social strata who possess conventional paper qualifications live in despair looking for scarce white-collar jobs. Those who have resources to invest in overseas training and/or foreign qualifications are in an advantaged position in the competition for private and transnational sector employment.

Author's abstract.

Hettige, S. T and Mayer, M (Ed.)(2000)

***Sri Lanka at Crossroads: Dilemmas and Prospects After 50 Years Independence.***

Macmillan India Ltd.

A year after Sri Lanka rejoiced 50 years independence, this book reflects on the range of issues confronting the island country as it pauses to enter the new millennium.

A compilation of some select papers presented at the conference 'Sri Lanka at cross roads: problems of Politico- Economic and Socio - Cultural Change After 50 Years of Independence', the book identifies the prerequisites for successful development - equality of opportunity, social justice, individual freedom, good governance, free and fearless political participation and consensus on key policy areas like education, health and devolution of power.

What makes this volume valuable is that it suggests various policy measures that could be adopted to address these problems. Some of these include decentralization of authority, empowerment of local institutions, independence bureaucracy and need for a social security system.

The book begins with an overview of the dilemmas facing the island country 50 years after independence. The first three articles deal with the impact of state policies on development; the next three on the problem of power sharing within the state system; the following two papers take up the status of women and youth; and the last two draw attention to the impact on globalization on Sri Lankan culture. The book concludes with an abstract of A J Gunawardana's paper, "Globalization and Cultural Change", which he was working on, before his untimely death. (STH)

Heynemann, S (2000).

***Educational Qualifications: the economic and trade issues.***

Journal of Assessment in Education 7(3): 417-438.

This paper describes the commercial provision of education goods (books, pedagogical software, etc) and services (testing, evaluation, management consulting, etc) and argues that a vibrant private sector is an essential ingredient for an efficient and high-quality public school system. It also describes the rising trade in education goods and services and points to areas of controversy associated with that trade. It concentrates on one small ingredient of the overall picture, that of educational qualifications. It discusses how changes in technology and labour markets are forcing a shift in the debate over access to education. Some argue that education, chosen by the individual, is human rights. Others argue that education by nature is different from other public services justifying government prohibition of private and/or international providers. Central to the debate are the differences from one part of the world to another in how educational institutions are accredited and how graduates become certified to enter the professional workforce. However one may feel, these issues are destined to become an important ingredient of the international educational debate over the next decade. SH

Hirst, Paul & Thompson, Grahame (1996)

***Globalization in Question***

Polity, Cambridge (UK)

In their introduction *Globalization: A Necessary Myth*, Hirst and Thompson provide two ideal types with which to compare what is actually taking place in the world economy. First, in *An International Economy* - the principle entities are *national* economies. Trade and investment produce growing interconnection between these economies. Multinationals maintain clear national home bases especially regarding research and development and high value-added activities. Second, in *A Globalized Economy* national economies are subsumed. The International economic system becomes socially disembedded. Transnational Corporations as opposed to MNC's become genuinely footloose capital, serving global markets through global operations and thus could not be regulated by national governments. There would be an open labour market characterised by capital rather than labour mobility. By using these ideal types Hirst and Thompson usefully call into question some of the assumptions about globalisation. In so doing, they offer some insight into the paradoxical regulatory responses of national governments to globalisation.

The rest of this book offers a detailed analysis of the functions of the world economy. Hirst and Thompson note especially the unequal spread of wealth and investment. "Inequalities are dramatic, remain stubborn to change and indeed have grown since the 1970's." Like Ohmae (qv) they identify a triad of internationally linked economies, but do not share Ohmae's optimism for the trickle down effect or the potential for developing nations to connect with this triad. Essentially, they see the three regions of the triad (North America, Europe and Japan) as continuing to follow their economic interests in a non-ethical way. Hirst and Thompson see this as having serious implications for world stability. Thus, this exclusion of the majority which is consigned to poverty, will lead to disorder and economic disruption.

Hirst and Thompson are not optimistic that globalisation would favour or improve the economies of developing countries. Firstly, since they argue that MNC's are home based and not as truly mobile as optimistic globalists propose, the shift of capital and thus employment to developing countries is unlikely to be significant. (In this they directly dispute Dicken's Global Shift thesis.)(qv) Secondly, the widespread adoption of *kanban* or just-in-time, customised production processes favours highly localised sourcing and labour which is broadly skilled, well educated, autonomous and flexible, rather than low-wage low-skill labour. A rise in economic protectionism in the triad regions would provide a corrective return to the status quo ante, if they were mistaken.

Hirst and Thompson acknowledge the effects of financial interconnectedness. However they note all through the book, and in their conclusion, that those who are most advantaged by this, act to prevent any crises affecting such advantage. The advantaged group rarely acts to improve the lot of the majority; although ultimately the results of such neglect will, they argue, affect all.

Jayaweera, Swarna (1994)

***Structural adjustment Policies, Industrial Development and Women in Sri Lanka***, in *Mortgaging Women's lives*

London and Atlantic Highlands, Zed Books

This article examines the impact of structural adjustment programmes on the pattern of women's labour in Sri Lanka. It deals with women's access to assets, resources, skills and services, gender divisions of labour and women's status in the employment hierarchy. An historical background is provided describing the welfare based socio-economic policies from 1948 to 1977, which provided free education at all levels. In this period literacy rates rose to 80-90% of the population. Large numbers of secondary educated women entered the labour force. Economic decline in 1950s led to high levels of unemployment. High levels of state intervention in the economy followed. The economy was liberalised in 1977 with a new government. The acceptance of IBRD and IMF loans together with a structural adjustment package, affected industrial development.

Some of the features of structural adjustment were that trade and payments were liberalised, the Sri Lankan Rupee was floated and depreciated by 46%. Incentives to investment and export were developed. The banking system was extended. Privatisation was introduced in many industries. There was a resource shift from consumption to investment, subsidies were removed and welfare expenditure was cut. Export processing Zones were introduced. The manufacturing sector became import dependent and value added was minimal. Unemployment rose.

Jayaweera notes a significant change in the pattern of women's employment at this time. For example there was a collapse of cottage of industries, especially handloom weaving and increased mechanisation occurred. The textile industry was privatised resulting in the loss of 40,000 jobs. The following effects on education are noted: in the 1960s and 1970s handloom weavers were secondary school drop outs who gained economic independence enabling them to educate their children to a higher level. Factory based textile workers have 10-12 years at school and are employed in semi-skilled and manual occupations. Cultural perceptions of textile-based trades as women's work protect jobs from male competition. However women are concentrated in dead end jobs with fragmented processes of production and little opportunity for skills upgrade or transfer. De-skilling occurs. Industrialists subcontract to save costs and use women outworkers at low rates of pay.

Jayaweera suggests the following solutions. Transnational corporations should be committed to investment in skills and should use some profits to ensure satisfactory conditions. Jayaweera prefers an approach that loosens ties with foreign direct investment and multilateral lending packages. For example, promoting endogenous development and the resuscitation of domestic industries. Women need access to credit and training. They should become equal partners in the economy and thus more self-reliant.

Lewin, Keith. M. (1998)

***Education In Emerging Asia: patterns and futures into the 21st century***

International Journal of Educational Development **18:2**, 81-118

This paper identifies significant trends in educational development in Asia and their implications for education policy in the 21st century. Of particular importance to our research is the section outlining the implications of globalisation for education in developing member countries (DMCs) of the Asian Development Bank. Lewin works with a multifaceted definition of globalisation which includes the development of integrated markets, an increased movement of labour and jobs across countries, a growing interconnectedness of communications, an increase in students studying abroad, a cultural convergence driven by international media, and increases in international travel.

There are several implications for education. The globalisation of markets generates a movement of production with mature technologies 'down a staircase' related to the cost of labour. Within a given cost of labour, inward investment in manufactures or services will be attracted by a highly educated labour force. The decreasing cost of communications means that services can be located almost anywhere in the world. Students 'abroad' can now exploit new learning technologies and no longer require full time residence and face-to-face contact at the host higher education institution.

The globalisation of labour markets encourages the development of internationally recognised qualifications and the adoption of common standards, which enhance the individual's chances of migration. International examination boards are active in many Asian DMCs. This activity is supplemented by links between external and internal assessment bodies. For example, national examination syndicates seek external recognition of awards; universities employ examiners from other countries to validate standards. Migration of labour from poorer to richer countries generates income remittances for the former. This migration is often underpinned by minimum levels of education, trade certification and language proficiency.



Lewin, K and Dunne, M (2000)

***Policy and Practice in Assessment in Anglophone Africa: does globalisation explain convergence?***

Journal of Assessment in Education 7(3): 379-399.

This paper explores policy and practice in assessment in developing countries in Anglophone Africa in the context of globalisation. A simple interpretation of some globalisation theory suggests that there should be a convergence in the form and content of assessment following on from innovations in practice in metropolitan countries, in this case, England. The analysis of assessment instruments shows that there has indeed been some convergence across the nine African cases examined, but that this is not best explained by the adoption of innovations current in the metropole. More powerful explanations are grounded in the structural similarity between the African systems. Amongst other things this leads to gaps between the rhetoric of assessment reform and the reality of assessment practice. These persist despite consistent projections in the assessment literature (both national and international) and in externally supported curriculum and assessment projects of what should be valued, what should be assessed, and what may be relevant to future employment.

MD/KL

Lewin, Keith M (1995)

***Development Policy and Science Education in South Africa: Reflections on post-Fordism and praxis.***

Comparative Education **31: 2**, 210-221

This article explores issues for science and technology education in the developing world. It considers the implications of changes in the organisational basis of production associated with globalisation and post-Fordism for science curriculum practice and development and classroom practice in the new South Africa.

The central question of this article is whether science curricula are being designed which will meet the needs of post-Fordist production technologies (PFPTs). Lewin differentiates between Fordist and post Fordist methods of production. There are two tables showing the characteristics and advantages of PFPTs. Other features of globalisation's effect on technology are mentioned, most notably the withdrawal of governments from 'near-market' research and the dominance of the private sector in research and development and intellectual property rights. The effect of rapid urbanisation on the connection between economics and technology is considered.

"Successful economic transformation of South Africa is likely to be accompanied by the introduction of new methods of organising production in industry". The main implications of PFPTs for policy research on science and maths education are in the areas of economic competitiveness and the dangers of replicating high status, academic curricula which have neither application nor relevance for PFPTs.

The possible implications of PFPTs for science education are the associated clusters of technological innovation.

Lewin argues that PFPTs can encourage greater democratisation in the work place and empower workers. Skill levels are enhanced and value added is increased. However, he notes that there can be a downside to lean production methods.

The PFPT skills, which need to be met by science curricula, include quality control and self-regulation. This requires changes in the ways science is taught and learning outcomes are evaluated. There needs to be movement from a linear, external assessment to self-regulated and intrinsic assessment. Skills of continuous improvement, known in Japanese as *Kaizen* need to be cultivated. Co-operation and competition teamwork and flexible specialisation can be developed. Science traditionally has not taught statistics, probability and decision making skills well. This requires attention. Sustainability becomes an aspect of dependence on effective demand rather than production capability. This has implications for curriculum design.

Little, A.W. (2000).

***Globalisation, Qualifications and livelihoods: towards a research agenda.***

Journal of Assessment in Education 7:3 299-312

The economic, political and cultural manifestations of globalisation are distinguishable from its underlying causes. The definition of globalisation used in this paper focuses on the reduction of obstacles to trade'. A function of both economic policy and technological advance, trade barriers, financial regulations and cross-border communications have been liberalised. These are contributing to changes in the composition, control and locus of livelihoods, and life chances and social mobility of livelihood seekers more generally. Educational qualifications and assessments mediate livelihood creation and livelihood seeking, to different degrees in different contexts. the role of assessment in the certification and selection for jobs interacts with economic globalisation in two main ways. The first is through the impact of globalisation on the composition and volume of livelihoods and the demand of both livelihood creators and livelihood seekers for qualifications. The second is through the reduction of trade and communication barriers on the internationalisation and commercialisation of the assessment and qualification business. The paper concludes with a research agenda that explores these two strands and emphasises the interactions between global, national and local contexts and influences.

Author's own abstract

Lowe, J (2000).

***International examinations: the new credentialism and reproduction of advantage in a globalising world.***

Journal of Assessment in Education 7:3, 363-377

International examinations are increasingly being used by local elites to reproduce their advantage in the face of growing educational competition and the changing economic order associated with globalisation and 'post-Fordism'. Evidence from opportunity samples of students taking these examinations in five countries suggests how this may be working in practice. The evidence indicates that the patterns of use are various and are influenced by both local educational cultures and by considerations of location in relation to global economic 'cores'. International credentials bring a qualitatively new dimension to the issues of credentialism and credential inflation as they exclude the majority from participation in the new competition for access to the most advantageous occupational opportunities. JL

Martin, Hans-Peter And Schumann, Harald (1997)

***The Global trap: Globalization and the Assault on Democracy and Prosperity.***

London and New York, Zed

This German book is written in a journalistic style. It contains a large amount of information which the authors use to back their central thesis. Globalisation is seen as a manifestation of free-market capitalism and as being entirely negative in its effects. This book is in complete contrast to those by Reich and Ohmae, which see economic nationalism as a negative and outdated position. Martin and Schumann defend a strong economic nationalist position.

They posit a world society in which 20% of the world has work and 80% do not, being part of a reserve necessitated by increasing economic globalisation. They fear the extremes of market capitalism are damaging to democracy. The exponential global spread and increase of various forms of financial speculation, has, they argue taken over the purpose of the Bretton Woods system and created a new dictatorship of wealthy speculators.

For research concerned with livelihoods Martin and Schumann's fourth chapter: *The Law of the Wolves: The jobs crisis and the new transnationals*; is of interest. It is written from the German perspective where concern about high unemployment and the reduction of wages and trade union involvement is of current concern. The low wages of educated Indian software workers in Bangalore are seen as a threat to European, especially German jobs. China and Vietnam are lined up to threaten European jobs further.

On political matters Martin and Schumann are consistently pessimistic about the decline of politics and the future of national sovereignty. They cite the way in which the transnational corporations avoid taxation thus reducing amounts available for public expenditure.

As a solution to the disastrous results of globalisation foretold by Martin and Schumann they propose that "The aim...should be to counter destructive Anglo-American neo-liberalism with a patent and viable European alternative." (See also Gray)

The authors end the book with ten points for increased European integration and regionalism, including European monetary union, which would provide this counter.

Mitter, Swasti And Rowbotham, Sheila (Eds) (1995)

***Women Encounter Technology: Changing patterns of employment in the third world.***

London, Routledge

This book is a collection of 15 papers and an afterword which explore the diversity of ways in which new technology has affected women's employment, education, and training in several different industries and services around the third world.

Women most likely to gain employment using new technology (especially computers) are probably educated to post-primary level, as noted by Pavla Jezkova, writing about Bangladesh (p.108). Mayuri Odedra-Straub, writing about sub-Saharan Africa, notes the many obstacles in the way of women and girls gaining the education necessary for IT based work (p.263 ff.). Odedra-Straub also notes the low numbers of women studying technical programmes in universities. She notes that participation in Modern sector employment is linked to education and proportions of women are low.

Sujata Gothosokar records the dilemma faced by Indian women bank workers: Trade unions have used new technology as a bargaining tool and thus to some extent compromised women's opportunities to obtain work place training in new technologies. However, when training was provided it was likely to be limited to a narrow area of work and did not tend to provide transferable skills. Multinational banks in India employed over 70% women.

Cecilia Ng Choon Sim and Carol Yong note that in Malaysia computer education starts in the primary school with computer clubs (p179ff.) In universities women are underrepresented on science and technology courses. However, in employment such as data-processing, most employees were women.

Globalisation of employment is made possible by new technology. Ruth Pearson writes about the increase in "offshore office work" where "well educated" Caribbean women provide high quality, productive computing at one sixth the cost of equivalent US workers. Charlene Gannage discusses immigrant workers in the Canadian garment industry and notes the high level of qualifications and skills which many have, although working in low skill jobs in Canada.

NAMACO (1997)

***National Manpower Needs Survey: 1996***

Harare, Zimbabwe

This survey was embarked on to generate information which would enhance NAMACO's advisory role on manpower issues so as to address the needs of the economy. Its objectives were to:

- Identify perceived occupations (direct and indirect) in the various sectors;
- Determine and explain current and anticipated skills shortages, surpluses, redundancies and emerging skills requirements;
- Identify recent or planned technological changes and their implications on skills requirements;
- Determine skills generated through in-house training and at other institutions;
- Ascertain and explain business trends for the past five years prior to the survey;
- Determine if there had been any major changes since the 1995 survey.

The survey noted that the current and anticipated manpower/skills shortages were in management, accountancy, computer operations and information technology, engineering, surveying, chefs and mechanics. Management areas facing skills shortages included finance, marketing, production operations and engineering. Inadequate local training and brain drain were cited as the main reasons for both the current and anticipated shortages. Occupations particularly affected by inadequate local training facilities include architect, actuarial science and some surveying and engineering fields. The shortage of managerial and accounting skills was attributed to brain drain especially within SADC region and overseas.

The report also noted the coming in of new skills. These were computer skills, including desktop publishing and computer-aided design and manufacturing, quality control, customer care, horticulture, marketing and town planning. Technological changes necessitated the introduction of these new skills in both the current and planned operations of establishments. On the other hand technological changes also brought with it skills redundancies generally in the clerical/secretarial, general labouring, security, welding and accounting fields. Over training and lack of career guidance were mentioned as likely to cause a surplus situation particularly of clerks, junior accounting personnel, mechanics, waiters, printers and welders.

The majority of establishments surveyed had introduced training programmes, although less than half of them opened their courses to outside employees. Most of these programmes are found in computers, management, supervisory, customer care, sales, first aid and safety. Establishments also supported training provided outside the organisation and would mostly offer scholarships in fields related to their operations.

On the technological front computerisation was the major and most mentioned technological changes introduced by all the sectors of the economy with plans to extend and upgrade this process to more areas of operations. The use of E-mail, fax machines and the Internet has also gained prominence as establishments try to catch up with technological changes the world over. Other changes include the mechanisation of operations and the use of plastic money and automated teller machines in the banking sector.

The majority of establishments reported an expansion in business indicating a general growth within the economy. The most cited positive factors that influenced business performance were buoyant demand, trade liberalisation, good rains, availability, competition and export incentives.

Amongst the factors mentioned as negatively affecting business performance were high interest rates, competition, drought and high inflation.

In conclusion the report notes that the area of information technology had continued to experience new developments and technological changes that may other area. Further, the report laments the lack of co-ordination of labour market research, with so many parties involved but operating independently and hardly sharing information.



Nherera, C.M. (2000)

***Globalisation, Qualifications and Livelihoods: the case of Zimbabwe.***

Journal of Assessment in Education **7:3** 335-362.

This article explores how globalisation has impacted on the demand and nature of qualifications and livelihoods in Zimbabwe. It argues that while economic globalisation has had an effect on the labour market, particularly through economic reforms such as the Economic Structural Adjustment Programmes, colonial legacies continue to influence education and training in Zimbabwe. The article observes that although access to education has increased phenomenally since the attainment of political independence, this has not significantly solved unemployment and the reduction of poverty as new challenges have surfaced.

The information and communications technology revolution that characterises globalisation has changed the skill and knowledge requirements for most jobs, leading to the need for continuous retraining and the improvement of one's qualifications. Yet qualifications have no impact on the availability of employment opportunities since these depend on the prevailing economic situation. The article comes to the conclusion that while globalisation has created new opportunities through liberalised economic systems, it has mainly benefited industrialised countries with more stable economies. For developing countries such as Zimbabwe, it has had a negative impact since it has led to retrenchments, weakening of the informal sector, increased consumer prices and a general decline in living standards. CN

Nziramanga C.T. (1999)

***Report of the Presidential Commission of Inquiry into Education and Training***

Zimbabwe

The advent of national independence in 1980 ushered in far reaching reforms in education and training based on the development needs and goals of the new dispensation, which included democratisation of, and expansion of the provision of education and training. In January 1998 President R.G. Mugabe constituted a Commission of Inquiry into Education and Training in Zimbabwe to review the current education and training systems in relation to present and future needs of the country.

The terms of reference of the Commission in general looked at the inherited systems of education and training; the provision of education and training; organisational capacity and management; financing of the education and training systems and any other related issues the Commission deemed appropriate.

**Summary of Findings and Recommendations**

The report attempted to address and respond to specific terms of reference and highlights the challenges and opportunities that policy-makers, planners, educator, industrialists and other stakeholders face on the eve of the Third Millennium.

The Commission noted that very important recommendations of the Report of the Southern Rhodesia Education Commission (1962) and the Committee of Inquiry into African Primary Education (1974) have not seen the light of day. If they had been implemented the Commission felt that the state of education would have been better than it is now. This observation intuitively highlighted the fear of the Commission to the President, that its recommendations also might not be implemented.

The Commission also noted that education and training vote took the largest proportion of the national budget. This was as it should be because education is a fundamental strategy to prepare Zimbabweans for socio-economic well being in the new millennium and to be competitive in the global era dominated by information technology.

The Commission among other recommendations made the following recommendations, which they believed required urgent attention from the President.

- The Commission recommended a nine-year compulsory basic education (Junior School) cycle for all pupils in order to cultivate the habits, attitudes, interests skills and entrepreneurial opportunities which would prepare them to be good citizens and provide them with a good foundation for training in occupations of their own choice at Senior School 1 and beyond.
- The Commission also recommended an outcomes based curriculum which is broad-based in terms of subject offerings and which focuses on learning areas, employment related skills and other essential skills to be developed across the curriculum.
- In order to improve the post-basic education, the Commission recommended three interlinked Programmes: General (Academic), Commercial (Business) and VocTec (Vocational and Technical) whose certificate carries equal weight. These Programmes are taken at Senior School I and II. In the new dispensation, with core subjects and electives, students will, if they so wish, transfer from one programme to another.

- Underpinning all innovations is viable resource mobilisation (funds). The Commission, therefore, recommended various strategies whereby various stakeholders support the government in resource generation to finance education and training.
- Finally, the Commission strongly recommended the establishment of a permanent body of experts outside the Ministry of Education to monitor and evaluate implementation of the recommendations and to advise government of policy changes when necessary.

OECD (2000)

***Thematic Review on The Transition from Initial Education to working life.***

OECD. Paris,

This is a valuable report because it studies in depth the policy implications for education and training systems that help young people to make successful transitions from full time school to full time work. It examines in detail this transition process as it occurs in 6 OECD countries: Australia, Canada, Czech Republic, Norway and Portugal. 8 further countries are in the process of being added to the country reviews. These will be Hungary, Denmark, United Kingdom, Japan, United States, Finland, Switzerland and Sweden. This represents a wide range of developed and transitional economies.

The perspective examines societal rather than individual rationales for the ways in which transitions occur. The process of transition is getting longer for many young people., and a key to whether the transition is made successfully, or whether, the young person falls into a risk category is in the connections between the education and labour market and employment throughout the transition period. Whether or not welfare and social programmes provide a safety net to reinsert those who are in danger of becoming marginalised in the process is significant. Pathways are used to conceptualise the different types of transition:

1. general education pathways.
2. school based vocational pathways.
3. apprenticeship pathways.

The report notes, however that policy attention is often wrongly directed at those pathways which are chosen by a majority of young people; while those which are followed more can be neglected. Although there have been major shifts in the nature of employment from manufacturing to service industries there is often a tendency for policy to favour industrially based pathways.

In all the countries reviewed educational participation has increased and youth to adult unemployment rates have fallen. However the dangers of focusing on short-term employability are illustrated by the case of Portugal, where there is easy access to work which requires few skills and low educational qualifications. Qualifications need to be made relevant, consistent and coherent; and maximize flexibility. Close involvement and partnership between employers, employees and their representatives can achieve this. The role of intermediary bodies acting as brokers is seen to be of value for young people. Career and employment guidance is an important part of successful transition, coupled with social support for those who may be at risk. Opportunities to gain real work experience while still in initial education are a key way to make education more relevant to the labour market. Valuable features in qualifications include double qualifying pathways which allow entry into either employment or tertiary education. Key or core employment related competencies are usefully included as part of qualifying pathways. Pathways should be broad, with multiple exit points so that flexibility can be tailored to suit individual need.

Two types of country response to tradition requirements are identified. The typology relates to the type of education system, the type of labour market and the nature of the linkages between them:

Type I countries have a flexible labour market and education and training systems in which genuine possibilities for lifelong learning arise. These are mostly Anglo-Saxon countries.

Type II countries have occupationally organised labour markets and linear, predetermine education and training pathways which equip young people especially with directly relevant

occupational qualifications. These are typically the Nordic countries .See <http://www.oecd.org/dataoecd/5/58/2346467.pdf>

Ohmae, Kenichi (1990)

***The Borderless World: power and strategy in the global marketplace***

London, HarperCollins

This book was written by a business consultant to alert managers and corporations to the ways in which increased globalisation of the economy should change the ways in which business is conducted globally. This is a business text written in a highly accessible style, thus increasing the scope of its influence. Ohmae deals in a series of prescriptions or recommended strategies, which he illustrates with many anecdotal references. The index reads like a long list of trade names. This book seeks to have a wide influence and no doubt its style and rationale have informed thinking in policy-making fora.

Ohmae represents an extreme view of economic globalisation wherein the free uninterrupted flow and connection of trade and innovation in goods, processes and services around the world is seen as the solution to practically all the world's ills. Lack of consumer freedom of choice is defined as the central problem in unsuccessful economies. Freeing up consumer choice and making full use of human capital rather than relying on resources and commodities, would, in Ohmae's view enable countries to engage successfully with an interlinked economic system. This is certainly seen as being the answer to development issues. Discussion of sustainability is absent.

Ohmae identifies a Triad consisting of Japan, North America and Europe which form the Interlinked Economy (ILE) so far. The following quotation captures the flavour of this book:

Duty-free shops are the precursor to what life will be like in a genuinely borderless environment. The same goods cost the same amount of money no matter what country you are in. In none are the prices higher because of duties or taxes.

For developing countries Ohmae warns against dependence on abundant natural resources for which markets can and do fail. Instead he urges the importance of adding value using human capital. Economies should be opened and multinational enterprises welcomed as the markets dictate.

The end of this book consists of "A Declaration of Interdependence Toward the World 2005" which summarises Ohmae's mission in strongly sentimental terms.

Porter, James (1999)

***Reschooling and The Global Future: Politics, Economics and the English Experience.***

Symposium Books, Wallingford

This book presents a strong personal critique of what the author terms the current diminution of the English education system. It is polemic in character, based on the thesis that in a global future schools need to become more flexible and creative, and more connected with the local communities. This would require a reduction of central control, which is based on outdated and inappropriate ideas about national competitiveness. Teachers and schools require the confidence; trust and independence to take responsibility for their own work in a reflexive school. Children are being educated for an unpredictable global future in which they will require the ability to work flexibly, innovatively and creatively. They are future civil society members in a world in which the meanings of democracy and the state are in flux. This book queries current preoccupations with centralised control of curricula, league tables for assessing schools' achievements, and the emphasis on human capital production in education. How will current practices in English education equip the citizens of the global future? (From Evans, J.E, (2000))

Preston, Rosemary (1995)

***Restricting freedom? International Credit Transfer and Skill Recognition in the Late Twentieth Century.***

University of Warwick

Twenty-one papers were presented for this conference and an abstract exists for each. Of particular interest for this research are the papers that assess the international recognition of academic and professional qualifications and the implications of these systems of recognition for the mobility of labour. One paper deals with competency-based education and another with recognition of prior learning in the Namibian qualifications system. These may be worth pursuing further. (The original papers are with Rosemary Preston at Warwick University.)

Reich, Robert (1991)

***The Work of Nations***

London, Simon & Schuster

This is an influential work on the development of the global economy and its effects on work, education and society, especially in America. Most of its influence is due to the fact that Robert Reich was Clinton's First term Labour Secretary, and this should not be underestimated in terms of what it means for work patterns around the world. It has also become widely known because of its accessible style.

Part 1 outlines the development of economic nationalism. By economic nationalism, Reich means the idea that separate nations compete with each other for commerce and profit. This sort of economic nationalism developed in the 20th century to encompass the big business practices of Ford and Taylor. Reich describes the ensuing production methods as high volume. The high volume production techniques of big business had particular requirements from its workers, such as obedience, conformity, punctuality and reliability. The 20th century American education system evolved to meet these needs. Students were educated and tested in large schools using standardised methods, following a similar linear progression to that employed in industry. Subjects, like mass-production components, were discrete and differentiated from one another. Schools were likened to factories. At the end of such schooling a well-paid factory job awaited even the least successful product of the system.

In Part two, *The Global Web* Reich contrasts the patterns set by the high volume, standardised, mass production national corporation with the high value enterprise of the late 20th century global economy. Reich demonstrates how the big hierarchical corporations of the first half of the 20th century have broken down to become diffuse networks of outsourcing and innovation. Economic nationalism becomes, he argues, irrelevant. The lines between goods and services are blurred and originality takes precedence over conformity. The skills needed to work in these high value enterprises are quite different to those required by the high volume industries.

In Part 3, *The Rise of the Symbolic Analyst* Reich identifies the 'Three jobs of the future'. These are: The Routine Production worker; the In Person Services Provider; and the Symbolic Analyst. He subdivides the symbolic analyst into further 3 job types; Problem identifier, problem solver and strategic broker -who works to bring the right problem identifiers and solvers together. These roles are traded extensively around the world in constantly shifting networks identifying, solving and brokering problems in innovative, creative and flexible ways. The skill in common to these roles is the ability to manipulate symbols. Reich has two interesting chapters on the education of the symbolic analyst. In the first place he notes the failure of the American public school system to make the shift from the high volume standardised models of education which served the economy in the first part of the century. Instead, symbolic analysts are being produced in the privileged classes of American society. They can afford to send their children to private schools, which teach children how to think innovatively, identifying and solving problems instead of conforming to a nationally required curriculum. Thus Reich notes there is an ever-widening divergence in American society in which the symbolic analysts will secede from the remainder of society. Behind this is a decline in public investment in education as well as the failure of the education system to adapt to changes in the economy. The solution for Reich is not just more investment but changes in education methods accordingly. Much of the remainder of the book is a call for political change and it should be noted that the date of writing coincides with the 1991 presidential campaign.



Sebatane, M (2000).

***International Transfers of Assessment: recent trends and strategies.***

Journal of Assessment in Education 7:3 401-416

International transfer of assessment is defined as the borrowing and adaptation of assessment techniques and approaches across countries. What is transferred is the information on and skills in various aspects of assessment. The paper examines this issue within the framework of globalisation. It then identifies strategies and resources that facilitate transfers. These are publications, formal training, information technology, professional associations, international organisations, international conferences, international consultancies, exchange programmes, and cross-national comparative studies. The place of local and national contextual conditions in assessment transfer is reviewed and the merits and demerits of various strategies of transfer are explored. MS

Stewart, Frances (1995)

***Globalisation and Education, Keynote Address***

Globalisation and Learning, Conference New College, Oxford

Globalisation describes the broadening and strengthening of world links and the increasing restrictions on independent national action of international constraints. There appears to be an acceleration of the internationalisation of economic relations, technology, ideology and culture at the same time as a widening gap between rich and poor countries. There are important links between international trade and the movement of capital and people and between multinational investment and the globalisation of culture.

Indicators of the increasing international movement of resources include, inter alia: the rising proportion of investment in developing countries accounted for by Transnational companies; the increasing proportion of global trade accounted for by Transnational companies; the domination of international technology flows by Transnational corporations; the growth of international trade relative to production; the growth of international finance capital; the reduced control of national governments over money supply and regulation of exchange rates. Underlying causes include a reduction in transport and transaction costs, trade liberalisation, and the reduction of international trade restrictions, financial deregulation, and increased use of computer technologies for communication.

Stewart focuses on the human resource aspects of education – that is education's contribution to rising productivity. She examines two types of causal chain; firstly from globalisation to a country's development potential via human resource capacity and secondly, from globalisation to a decline in educational conditions and decline in the capacity to succeed in the global economy.

The conventional wisdom on economic globalisation, development and education runs as follows: the liberalisation of world markets and the free movement of capital and technology increases the potential for economic development. In principle, the production of goods and of many services can be separated geographically from their consumption. Poor countries can secure jobs and incomes by producing for the larger market found in rich countries. Restrictions on trade meant that poor countries were trapped by small markets and low incomes leading to small markets and low incomes. Restrictions on flows of inward capital for investment, combined with low domestic savings meant few resources available for investment. But the free movement of capital and goods, combined with the much lower labour costs in low income countries, should mean, in principle the relocation of capital and production to low income countries which would, in turn, lead to growth in production, exports, employment and incomes.

Stewart suggests that this optimistic scenario was borne out in the Asian tigers but not elsewhere. A critical difference between these and other 'developing' countries was their different initial human resource bases. In 1970 the four tigers all had universal primary enrolments and over a third of their children in secondary school. Stewart argues that globalisation has made education's role in economic development even more critical than before. Not only does it affect labour productivity and the ability to compete in international markets, but it is now also necessary to attract international capital and to stimulate the accumulation of capital. 'What globalisation has done is to increase the returns to education available from exploiting the global economy and to raise the penalties for educational failure'

At the same time globalisation was accompanied by the debt crisis in many countries and structural adjustment policies. This has led in some countries to a reduction in state resources available for education, leading to a decline in enrolment and lowering of educational quality. Stewart identifies a new vicious circle stimulated by globalisation. Successful countries build on their good human resource capacity, succeed in the global economy generate higher incomes for families and more resources for education, more human resources and increased ability to

compete in the global economy. Failing countries start with a weak human resource base, economic failure diminishes the resources available for education, leading to a decline in the resource base. Educated and skilled persons in those countries are attracted to livelihoods in the richer countries whose restrictions on movement are less for skilled and educated labour. The net result of this vicious spiral is that the uneducated within and among countries, disproportionately girls, will become an underclass with low and falling incomes, large families and poor nutrition.

Stewart, Frances (1996)

***Globalisation and Education***

International Journal of Educational Development **16: 4**, 327-333

Stewart traces links between globalisation and education. She emphasises the importance of the human resource aspect of education. In this area countries with good levels of education have increased opportunities. But growth is more difficult for countries with weak levels of education.

The paradox which she observes is that if the globalised economy means for example, less state intervention, structural adjustment and debt servicing; there is less to spend on education, thus leading to a vicious circle for poor countries: " a lethal concoction as far as state provision of education is concerned"

Market philosophies in adjusting countries leads to fees being charged by schools which in turn leads to reduced attendance. Meanwhile the absolute expenditure on education in rich countries increases, so further upgrading the human resource base with which the poor countries have to compete in a globalised economy. This in part explains the widening gap between rich and poor countries in a globalised economy. There are failures and successes in the globalised economy and Stewart can demonstrate through the use of comparative tables how a great deal of this is linked to educational provision and school attendance. In addition, increased migration creates a drain, usually of a country's most educated individuals. For example, 60% of doctors trained in Ghana are believed to be abroad.

Stewart notes the critical importance of education, not as a luxury but as a high priority investment.

Tikly, L (2001)

***Globalisation and Education in the Postcolonial World: towards a conceptual framework***

Comparative Education 37:2, 151-171

The article examines the relevance of existing accounts of globalisation and education for low income, postcolonial countries, with special reference to the education systems of sub-Saharan Africa. Using recent developments in globalisation theory, existing accounts are analysed in relation to their view of the origins, nature and future trajectory of globalisation and the implications for education. It is argued that most of the recent literature deals with Western industrialised countries and the newly industrialised countries of the Pacific Rim and therefore has limited relevance for low-income countries. The literature that is concerned with low-income countries often lacks a firm theoretical basis and has been limited to a discussion of the impact of economic globalisation on education. Drawing on recent work on the political economy of development and the state in Africa, the article sets out a conceptual framework for understanding various aspects of the education/globalisation relationship in low-income, postcolonial countries including economic, political and cultural aspects. (Author's abstract. Copyright Taylor and Francis, 2001)

James Tooley (2001)

***The Global Education Industry: lessons from private education in developing countries***

Institute of Economic Affairs, London

Twelve case studies of private education companies operating in developing or transitional economies are discussed. Of these, only one penetrates markets internationally. All the others provide education in one country only. The lessons to be learned are by implication lessons for other developing or transitional countries and not for industrialised nations. In this monograph Tooley asserts that it is a misconception that private education is only for an elite.

Unterhalter, Elaine And Samson, Melanie (1998)

***Gendering the Global and the Local: ambiguous partnerships in the South African tradition***

Development 41:4, 54-58

Unterhalter and Samson highlight the nature of gendered assumptions about the local and the global as they map out the feminist analysis of the process of globalisation, global partnerships and educational change in South Africa.

They evaluate three types of global partnerships in educational transformation in South Africa. First they note eclectic borrowing by the policy community. Second under GEAR (Growth, Employment, and Redistribution) there has been a realignment from social partnership with the poor to social partnership with the rich and thus with global investors. Thirdly, there has been partnership with international NGO's although funding has proved unsustainable. Finally there are partnerships with International organisations since 1994.

Unterhalter and Samson identify three positions on globalisation within education policy makers in South Africa: the globalisation enthusiasts; the globalisation selectors, and the globalisation critics. They assess how each of these positions deal with inequities of gender. They conclude that the effect of these new global partnerships in South African education has been uneven. Already disadvantaged communities do not benefit from what Unterhalter and Samson describe as "uncritical global partnerships with multinational capital." Finally, they warn that the apparent neutrality of global partnerships "[is] often... a mask for the power of northern and western political forces".

Waters, Malcolm (1995)

***Globalization***

London, Routledge

Waters gives a useful overview of globalisation theories beginning with their historical development from the classical theories of sociology. (Marx, Weber and Durkheim). Theories are divided into *material*, for example derived from Marx; *political*, for example, derived from Weber; and *cultural*, for example, derived from Durkheim. He traces the development of globalisation theories through a number of precursor theories based on material dialecticism, international relations theories and functionalism. He moves on to give a valuable description and incisive critique of the main contemporary theorists of globalisation. In a synthesis of the work of current theorists he proposes a new sociology of globalisation with three main strands: economic globalisation, political globalisation and cultural globalisation.

For the purposes of research concerned with livelihoods the section on economic globalisation is useful. Waters sees economic globalisation as being predicated on world trade, but also as part of a long-term process with a recent acceleration rather than a completely new phenomenon. An important feature of economic globalisation is the move from Fordist/Taylorist modes of production to Toyotist (similar to post-Fordist) methods. Research concerned with livelihoods should note the importance for Toyotism of numerically and functionally flexible work forces. A section is included on migrant labour. Also addressed in detail are the effects of political and cultural globalisation.



Wilson, David N. (1998)

***Voting With Their Feet: Unemployed BA's pursuing community/technical college credentials***

Tenth World Congress of Comparative Education, University of Cape Town, South Africa

This paper outlines the findings of research into Ontario University graduates who subsequently undertake vocational courses in the Ontario College of Applied Arts and Technology Systems (CAAT) to improve their employment prospects.

The author acknowledges a problem with the research in that it is based on secondary data, of which very little has been collected which is directly relevant to the research area. To counter this he assesses a great deal of collateral data.

Wilson hypothesises that during a period of recession in Canada's economy between 1991 and 1995 there was an increase of students with a degree or some university background undertaking vocational training at CAAT; and that this is because the recession "created a climate conducive to the substitution of employment related credentials for previous considerations of the status and prestige accruing from university degrees." Wilson notes the role of changing perceptions of the purpose of education in tandem with the economic recession. In other words education for employability rather than "the acquisition of general knowledge"

Wilson notes the effects of globalisation on patterns of employment, especially the increase in non-standard forms of employment such as part time working, contract and temporary employment. In Canada, as in other nations, youth unemployment is increasing especially amongst grade 10 dropouts.

A useful quotation in this paper is from the Association of Colleges of Applied Arts and Technology of Ontario:

To develop graduates who have achieved learning outcomes that are consistent with broad based employment and societal needs and who are able to adapt to changing employment /workplace demands, within an environment that facilitates student learning and promotes personal and professional growth.

In other words the flexible work force written about in so many books and article on globalisation.

Wood, Adrian (1995)

***North-South Trade Employment and Inequality: changing fortunes in a skills driven world***

Oxford, Clarendon

A study of North-South trade in manufacturing and its impact on workers. The benefits of this trade appear to be greatest for unskilled workers in the South and skilled workers in the North. Unskilled workers in the North have suffered falling wages and rising unemployment. This has led to increased intranational inequality and has aggravated social unrest and corrosion. The impact on the South has been (optimistically) to reduce inequality by narrowing the wage differential between literate and skilled workers. However, the gap between illiterate workers and those with a basic education widens.

This book starts with a useful "Summary and Conclusions" chapter. Important sections for our research are: *Skills Differentials and Inequality in the South*, and *Skills Differentials and Inequality in the North*. Capital is a less important factor in north-south trade than skills differentials. Globalisation plays a role in the widening of skills differentials through the role of new technology based on microprocessors, continuation of demand shift and reduction of trade barriers. These combine to lead to growth in the global supply of intermediate skills intensive goods.

Policy implications for the South are the improvement of human resources through education, training and work experience and the reform of the foreign trade regime. Most important for this research is education and training: better educational policies and greater public expenditure. The improvement of education is a vital part of the solution. Increasing education and training in the North is an attractive proposition, but not as straightforwardly valuable as it would be for the South. This is because of the public expenditure and taxation implications of investment in education. Increased taxation would affect both skilled and unskilled workers. 'Thus it is only worth pursuing measures which would have a large effect on the skill supply per dollar spent.'

The failure of Northern governments to recognise that trade with the South has these adverse side effects, and to take appropriate counter measures, has fuelled the rise of protectionism, which slows economic progress in both regions. The best possible solution for the longer term in the North is a greater investment in education.

Thus it seems that the benefits of education in the South are clear and require long-term commitment. In the North additional public expenditure on education is seen as vital from a social point of view, but possibly having only incremental returns economically. The greatest increment for both North and South seems to be between the illiterate worker and those with a skill.

Wood, Adrian And Ridao-Cano, Cristobal (1996)

***Skill, Trade and International Inequality***

IDS working paper, University of Sussex, Falmer

World-wide, there is a push towards greater openness in trade between countries. What effect does this have on international income inequality? Current wisdom suggests that openness to trade is a necessary condition for developing countries to catch up with the developed countries. This research challenges this view. Wood and Ridao-Cano suggest that the effects of greater openness on the supply of skilled labour might cause the international gap to widen in the long run.

The World Bank promotes the argument that the removal of barriers to trade facilitates the narrowing of the income gap between developed and developing countries. Supporters of this view cite examples of how freer trade between specific groups of countries, such as the European Union, has narrowed the income gap between members. Others argue that trade between unequal partners causes international income inequality to worsen as it shifts the structure of production (for the richer partner) and away from (the poorer partner) sectors of greater growth potential. Observers point to the success (prior to more recent setbacks) of East Asia's 'tiger' economies in catching up through the protection of key sectors of their economies until these were mature enough to compete in the global market place.

Wood and Ridao-Cano examine the relationship between greater trade openness and developed-developing country skill levels, which adds a new perspective to the debate over free trade and income inequality. Trade leads to developed countries to specialise in skill-intensive goods and developing countries in labour-intensive goods which boosts the demand for (and wages of) skilled workers in developed countries, and depresses it in developing countries. If over time, supplies of skilled and unskilled labour respond to the changes in wages, the initial gap in skill supplies between developed and developing countries will widen.

The hypothesis was tested using indicators for openness of trade, school and college enrolment figures, and data relating to national land assets, in 90 countries from 1960-1990. (Note that secondary and tertiary enrolment figures are used a proxy for skill. Cross-national information on qualification levels, on the quality and content of secondary and tertiary education and skills acquired through formal training and experience are not available.)

The findings indicated that greater openness to trade tends to cause divergence of secondary and tertiary enrolment rates between more and less educated countries.

It also tends to cause divergence between land-scarce and land abundant countries, with land abundance depressing enrolment rates. As skilled labour is an essential determinant of economic growth, these findings suggest that greater openness to trade might widen the international income gap in the long run, by causing developing countries to specialise in goods of low intensity. The implications for policy are as follows:

There is no specific optimal trade policy suitable to all circumstances.

Rather, the most effective choice of policy will vary from country to country, depending on whatever strategy is most likely to promote skill accumulation in the long run.

Factors such as the initial stock of skills, national land stocks and location can all affect this equation.

(Adapted from IDS21)

Wood, Adrian And Owens, Trudie (1997)

***Export -Oriented industrialisation through primary processing?***

World Development 25: 9,1453-1470

This research extends the work of Wood and Berge (1997) which suggested that East Asia's manufactured export success is not replicable in developing countries with lower skills/land ratios. Wood and Owens examine whether the doubts about the replicability of East Asian experience can be allayed by a broadening of the definition of manufacturing to include primary processing. Can the processing of local raw materials (e.g. food canning) provide an alternative route to export-oriented industrialisation for countries without a comparative advantage in manufacturing, be more narrowly defined?

Using the earlier data set, expanded to include more detailed information on the nature of manufactures, the analysis suggests that primary processing needs more local natural resources than narrowly defined primary production. If the level of skill per worker is high, the comparative advantage lies in primary processing; if low, the comparative advantage lies in primary products exports. At the same time, primary processing is less labour intensive than more narrowly defined manufacturing. This has implications for equity and the distributional and social gains of the kind East Asia reaped from the expansion of manufacturing power.

Wood, Adrian And Berge, Kirsti (1997)

***Exporting Manufactures: human resources, natural resources, and trade policy.***

Journal of Development Studies 34:1, 35-59

This paper addresses the question: why are manufactures a large share of exports in some developing countries, but only a small share in others? The authors suggest that cross-country variation in the composition of exports is determined by variation in the availability of resources, or factors of production. The conceptual starting point is the Heckschler and Ohlin proposition of conventional trade theory: countries tend to export those goods with which they are relatively abundantly endowed. But in contrast to conventional trade theory, they specify the factors of production in a novel way. The conventional factors of production, capital and labour are replaced with skill and land.

Data from 116 countries (with populations over 1 million) on trade, number of years of schooling and land area comprise the main data set. These are used to generate skill/land ratios and manufacturing primary export ratios. The answer to the question why are some countries exporters mainly of manufactures and others of primary products is 'principally because they have different resources endowments, and more precisely because they differ in the relative availability of human skills and natural resources (or 'land')'.

The results call into question the universal applicability of conventional policy advice that openness to trade promotes economic development. The advice may be sound for countries with high skill/land ratios and a comparative advantage in manufacturing (as in East Asia), but not for countries with low skill/land ratios, where 'more open trade policies would tend to cause manufacturing to contract'

World Bank (1995)

***Workers in an Integrating World. World Development Report (18)***

Oxford University Press, Oxford

This World Bank Development Report sees safe, productive and environmentally sound work as the key to economic and social progress. Four key points are made. First, productivity raising economic growth is driven by sound investments in capital and in people's health and education. Second, increased integration can benefit workers in rich and poor countries, but governments must provide a safety net and help equip workers for change. Third, successful labour policies work in harmony with the market and avoid providing special protection to particular labour groups. Finally, when states move from central planning to market systems, governments should provide strong support to workers in transition. Increased integration can lead to 'absolute divergence'; in other words, the increased gap between rich and poor both within nations and internationally. There is rising prosperity, but unequally shared. There is a rapid reduction in the numbers of centrally planned and protectionist economies (1995).

The report is divided into five sections: 1) Which development strategies are good for workers?; 2) Is international integration an opportunity or a threat?; 3) How should governments intervene in labour markets?; 4) How can policy choices help workers in periods of major change?; and 5) The outlook for workers in the 21st century. Each of these sections proposes a question or problem which then report then goes on to answer or resolve often in a fairly definitive tone. The report's stated aim is to evaluate what a more market driven and economically integrated world means for workers. It attempts to make this evaluation at the same time as *advocating* greater integration into a market driven world economy. This leads at times to contradictions. Calls are made for less government intervention, but the importance of government safety nets in times of change is added.

Governments must gain... credibility not just by repeating the mantras of the IMF and the World Bank, but by following a consistent approach to reform

From the point of view of educational research this report is strongly and consistently informed by human capital theories. Education raises individual productivity. For example, in agriculture, the better-educated farmer is more likely to make use of high yield hybrids. Training is seen as an investment. The report encourages and advocates a deregulated market in training provision, which would free governments to concentrate upon the important provision of free and compulsory primary education and improved health care for infants and young children. These two factors are demonstrated to increase productivity in the long term. Vietnam is cited as an example of a centrally planned economy whose investment in human capital was under-utilised, leading to minimal economic growth until the country liberalised its economy. However, no mention is made of Vietnam's lengthy period of economic isolation; particularly from the US economy.

World Bank (1999)

***Knowledge for Development, World Development Report (21)***

Oxford University Press, Oxford

This report sees knowledge at the core of all development efforts. It deals with two sorts of knowledge: *technical knowledge*, and *knowledge about attributes*. The problems affecting development are unequal distribution of technical knowledge, or knowledge gaps; and uneven knowledge about attributes, or information problems.

Whilst acknowledging the iniquitous spread of and access to knowledge as a main problem of development, this report essentially maintains an optimistic tone. It is informed throughout by a view of economic globalisation as beneficent; and that entering the global economy is a necessary and valuable step to development. Recommended national strategies, or policies, for acquiring knowledge include an open trading regime and attracting Foreign Direct Investment (FDI). Policies for absorbing knowledge should include basic education and lifelong learning (LLL) and "up to date technical skills to participate in the global economy".

The liberalisation and expansion of telecommunications markets is seen as a great enhancer of the spread of knowledge. In an educational context the example of the African Virtual University is given. This uses 27 satellite receivers and the Internet (including a digital library) and operates via competitively selected local institutions to improve the capacity, quality and relevance of business, science and engineering instruction in sub-Saharan Africa.

The importance of international trade, especially export trade, is cited for acquiring knowledge. Contact with FDI and Multinationals means access to a large knowledge base. Travel and migration increase the flows of knowledge, but the disadvantage is that many people who leave developing countries to study abroad never return, especially those earning doctorates. This is serious because their education is usually subsidised by their governments. One solution might be to use them as knowledge brokers.

Knowledge and development in a global economy have important implications for education

What students are taught can be as important as the number of years spent in school. Maths, science, engineering and technology are more beneficial than other subjects. But skilled personnel must be complemented by opportunities in local industry. A competitive private sector must be allowed to develop to make use of the knowledge acquired in these subjects or unemployment and underemployment follow.

The report notes that access to education is unevenly distributed, disadvantaging girls and the poor. Also noted are that public education subsidies are skewed towards the rich especially at tertiary level, and that private schools provide better value by unit cost than public schools. Private schools specialise in subject areas where demand is strong. These observations are used to inform a view of education based on a competitive free market with parents and students as informed consumers. The complexities of markets in education are noted as inhibiting transparency and at this level governments have a role to make up for the limits in private markets for education. Policy can address market failures by firstly, decentralising decision making; ideally devolving down to the level of school management. Administrative decentralisation engenders a culture of participation and vigilance at community level, for example, reducing teacher absenteeism. Secondly, information needs to be made accessible, enabling citizens as consumers to make informed choices, thus ensuring accountability and efficiency. Thirdly, people need help to pay for their education; especially by offsetting the opportunity costs of taking time to learn. Finally, new knowledge should be used to update curricula.

The benefits of distance learning for capacity building is noted. The use of new technology enables open or mega universities and virtual universities. The importance of both a private market in telecommunications and competition amongst service providers is emphasised. The combination of freely accessible information and communications technologies and schooling is the means to giving the poor voice. Dissemination of research findings by donor communities shares knowledge for development.

Policy recommendations which relate to education are: that governments should formulate a national strategy to narrow knowledge gaps; tap global knowledge and create local knowledge and attract back home talented people who have studied or worked abroad. There should be universal access to basic education, highly trained personnel in science and engineering, strong secondary and tertiary sectors especially in engineering and science and opportunities for lifelong learning.

This abstract covers those aspects of the report, which pertain to education, globalisation and livelihoods. There are other sections on knowledge about the environment and knowledge about economic finance.



ZCTU (1996)

***Beyond ESAP: Framework for a Long-term Development strategy in Zimbabwe***

Harare, Zimbabwe

This is a report prepared by the labour body ZCTU just after Economic Structural Adjustment (ESAP) in a bid to provide an alternative development strategy in Zimbabwe. The report observes that, in the absence of a pro-active state, ESAP or the market alone cannot transform the economy and create productive employment opportunities. The Zimbabwe economy is structurally distorted in that the formal sector is relatively independent of the informal and communal sectors in which the majority of the labour force works and lives.

The labour body sees the Zimbabwe economy being characterised by dualism with the formal (generally large scale, export driven and import dependent) on one hand and on the other hand non-formal sector (the informal and the communal), wherein the latter stands in a marginal and peripheral relationship to the former. This legacy has been reinforced by both colonial and post-colonial policies, which have had a formal sector bias. The trickle-down effect from the formal sector to the non-formal sector is too weak to transform and absorb these latter sectors into formal activities. Even if a market -driven enabling environment were established under ESAP, the no-formal sectors would not be able to pull themselves up by their bootstraps, due to the many structural constraints and adverse resource endowments impeding growth in these sectors. Market forces on their own would simply perpetuate this dualism, even in the presence of some growth in GDP.

In this regard the report proposes that a proactive role of the state is needed. This is important in order to transform the formal and non-formal sectors such that they are positively interlinked so as to generate and sustain mutually reinforcing growth in employment and income. In addition, this will upgrade the economy towards more internationally competitive activities beyond the current focus on primary products.

The report recommends that a mutually reinforcing bottom-up and top-down strategy, that is holistic and integrated be pursued. The strategy would primarily aim at resolving the structural constraints and adverse resource endowments militating against growth of productive activities in the formal and non-formal sectors. More generally, the aim of the strategy would be to indigenise the growth process in a manner that allows for the participation of the majority of the labour force in productive activities. This will enable the economy to absorb external shocks by diversifying and deepening the economy in terms of the amount of value-added that is created internally.

In order for the state to create a favourable climate for successful implementation of the "Beyond ESAP" alternative, the Government decisions must be taken on an informed objective basis. Government needs sufficient planning, implementation and monitoring capacity, based on a strong professional administrative culture that is characterised by transparency and accountability.

The report concludes by observing that ESAP failed in Zimbabwe and elsewhere partly because it is an external designed economic programme which does not suit local realities. According to the report, ESAP did not derive from the prevailing conditions in Zimbabwe.

As government was preparing for the next phase of reform programmes after ESAP, ZCTU was concerned that these programmes will be a continuation of the same strategy. For the way forward, the report proposes an alternative strategy to ESAP. The alternative is based on the contention that the development of the country should not be predicated upon the activity of the formal sector alone. A two-pronged approach is required in which recognition is given to the role of both the formal and no-formal sectors of the economy. Only under the recognition of the role of the two sectors and the elimination of the official resource discrimination against the latter, will technical and distributive efficiency be promoted in Zimbabwe. At the same time the report

proposes that the labour movement should join hands with the government and the employers in a joint institutional structure for a compromise where all interested groups and stake holders participate in policy formulation, decision making and implementation. (Nherera and Manganye)

## Annex

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### Other published output from the GQL project

1. Special issue of the *Journal of Assessment in Education: Principles, Policy and Practice*, Carfax publishers, Volume 7, No 3, 2000 on the theme 'Globalisation, Qualifications and Livelihoods'

Editor Angela W Little

#### Contents:

*Globalisation, Qualifications and Livelihoods: towards a research agenda*  
Angela W. Little

*Globalisation: an annotated bibliography for the readers of Assessment in Education*  
Jane Evans

*Economic Liberalisation, Qualifications and Livelihoods in Sri Lanka*  
S.T.Hettige

*Globalisation, Qualifications and Livelihoods: the case of Zimbabwe*  
Charles M. Nherera

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3. 'Borderless Higher Education and Qualifications', in *International Perspectives on Higher Education*, Hangzhou, Zhejiang University Press, People's Republic of China, 2002  
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