Introduction: Making global education markets and trade

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Global Education Industry

The global education industry as a whole is estimated to be worth $4.4 trillion and growing (Strauss 2013), which led Pearson in 2012 to predict in their annual report that "education will turn out to be the great growth industry of the 21st Century" (Pearson, 2013, p. 8). There is increasing number of private for profit schools and universities around the world as well as significant growth of different forms of privatisation of previously public education. However, the expanding education industry includes much more than privatised education provision.

The industry's diverse services span from students' recruitment to organising pathways courses into higher education, from marketing to market intelligence services, from standardised test provision to certification, from teacher training to investment brokering, and there are many more. "All these services, the actors that provide them and the systems of rules and norms through which these educational markets emerge and expand, constitute what we call the global education industry" (Verger, Steiner-Khamsi, & Lubienski in this issue).

Whether students, parents, academics, administrators or policymakers, they all experience these different services, one way or the other. Indeed, some may be taking on the role of market actors in the various education markets. Whilst there is a great deal of writing on the privatisation of education, and gestures are made to education marketization as a key element of privatisation, the research done on understanding how education markets are produced and maintained is limited. Particularly missing are first, the broader framing of the industry beyond education provision (Verger, Lubienski, and Steiner-Khamsi 2016); and second, the broader political and social contexts to avoid what Robertson and Dale call 'methodological educationism' (Robertson and Dale 2008) and consequent 'institutional parochialism' (Dale 2005) that are reflected in studying education markets in isolation as *education* policy studies.

It could thus be argued that although marketization, commodification and privatisation are by now rather popular topics of research in education, markets are treated as a black box at worst, or a flat canvas at best. They are rarely taken as objects of study in their own right and consequently they are often understood as simple, flat, and appearing by fiat (Komljenovic and Robertson 2016). However, unpacking market-making processes is important not only theoretically, but also politically so that we see power and interests at play, as well as the basis on which these processes and outcomes might be challenged and changed.

This special issue aims to generate some theoretical, methodological and empirical insights into the very complex and new ecology of education. This special issue has its genesis in two panels that we have organised at the Comparative and International Education Society (CIES) Annual Conference in Vancouver in 2016. The questions that these panels were interested in were: *how is education becoming part of global trade in services, how are education markets constructed, who are the actors involved, for whose benefit, with what consequences and outcomes for the sector, and for society at large?*

Drawing on various theories of markets the authors in this special issue seek to go beyond the approach that analyses education markets through policy and rather frame market-making as broader set of processes, which are as much economic as they are cultural, social and political (Aspers 2011; Callon 1998; Fligstein 2001; Beckert 2002). The authors focus on the nuts and bolts of market-making with rich empirical analysis. Consequently, they identify a number of market devices such as standardisation, infrastructure and metrics, and analyse how these devices work to set-up and lubricate the ongoing workings of particular markets. The authors also reveal networks of market-making actors, from philanthropists to private companies, governments, and others who together work and invest to expand markets as well as (re)structure national, reginal and global political institutions. They point to the role of strategies of particular actors. Especially key are ways in which they colonise time and space to strategically advance particular forms and types of markets and market institutions. Finally, they analyse the rules and institutions that are necessary for markets to work at national, regional and global scale.

The key arguments that emerged at the CIES panels and which are captured in these contributions in this special issue are that markets are not natural phenomena; they must be constructed and maintained and this takes a considerable amount of cultural and political work. Further, markets in the global education industry are different, work in diverse ways, and include a variety of actors, who promote and establish different rules and market institutions. Market-making activity is also contested. The papers also reveal that it is important to analyse market-making by focusing on markets in their own right rather than as part of a cluster of ideas around neoliberalism. In doing so, they also recognise all of their complexity, messiness and diversity. This allows insights that would otherwise be invisible or dismissed, but which are clearly relevant and impactful in education governance.

In what follows we will move from the concrete and empirical levels of education markets to the political side of state-region relations and finally to the global institution-making of education trade. Consequently we start with elaborating the market devices that are set up for market construction and operation, move to strategies of actors when advancing their interests, over to the functioning of networks and capital including the state and regional politics of market-making, and conclude with contestations to education market-making and market expansion. This overview nicely takes us from the micro, empirical, and technical processes and objects of market-making to the meso and macro strategies, policies, ideations and power relations. Devices and strategies are working together with politics and capital for education market expansion. They are all meshed together into what we call the *global education industry construction*.

Education Market Devices

A number of the papers in this special issue in their own ways analyse the micro-work that is needed in constructing markets. Sam Sellar examines how data standards, and standards of sharing data between different systems, constitute the data infrastructure. This infrastructure is then privatised and represents an opportunity for data to be framed as objects of market exchange. Curtis Riep focuses on how mass production as a process is mobilised to deliver low cost schooling; the case he elaborates is the model developed by Bridge International Academies. Bridge Academies provide education to children from families who live on less than $2 per day, and in doing so are bringing very poor families into education markets as a development strategy. Janja Komljenovic analyses the emerging international students' recruitment industry on the case of ICEF, a company headquartered in Germany, who have created a new market through the sale of workshops that bring together universities and international students' recruitment agents. ICEF market-making strategies benefit from the increasing number of universities and countries who compete to attract the highest number of international students. Antoni Verger, Gita Steiner-Khamsi and Christopher Lubienski introduce three empirical cases of American charter schools, standardization, and low fee private schools to reflect on the sociological approaches to studying markets. In each of the three cases they look at the role of networks, institutions and ideas or cognitive (re)framings.

These papers together Identify the role of devices in constructing markets (Muniesa, Millo, and Callon 2007). Each closely analyses a particular case and each shows the various ways in which market devices are imagined and created; and market relations entered into. Many of these devices have investors, creators and promoters although sometimes these devices may seem to be every-day objects, as necessary for other purposes, and not economic or market related. These devices discussed in this issue include: (i) standards and standardisation, (ii) technology and infrastructure, and (iii) data and metrics.

Standardization as a market device: Standardisation and the resulting standards are a key device in constructing markets. Standards are normal and expected parts of markets as they lubricate their smooth operation by increasing efficiency, reducing cost and enhancing trust (Beckert 2009; Fligstein 2001). All cases reveal that the actors who are at the heart of these processes work intensively to create industry standards, often without charging for this service. Sellar shows how the principle of the open standard, in which companies like Microsoft participated, was in fact part of the company strategy to grow the total value of the data market. In the case of Bridge academies, standardisation of curriculum, teaching and managing of academies is described by Riep as a 'back-room' process to rationalise the teaching and learning process, and in doing so, to make it more efficient. In the case of ICEF, the creation of recruitment agents' quality standards is a mechanism that creates trust in the industry and in the sale of efficient and effective meetings that are sold as a service to universities.

What we also learn from the contributors to this special issue is that standardisation also provides market opportunities for innovation and new products. Sellar shows that after the infrastructure is set up, and standards are created to exchange data among different systems, then data can be commodified, monetised and exchanged in a market setting. In his case, standards in their own right enable opportunities for data-driven products and services. Similar dynamics is examined by Riep, who shows that standardisation as a 'back-room' process' enables other commodities and markets to thrive – like tablets and software that is used by teachers , and the school manager, and who now have lower qualifications, or 'electronic money', with which parents can pay for their children's tuition fees by phone. Thus we can see that standardisation is not only aimed at increasing efficiency, or in reducing cost and enhancing trust, but is in itself enabling the creation of new commodities and markets.

Digital technology and infrastructure as a market device: Digital technologies and infrastructures are a second key group of market devices. The case of data infrastructures in Australian schools shows that technology, which allows the standards and the digital data to be stored, processed, shared and reproduced, is key in the process of creating commodities out of data and standards. The case of Bridge International Academies reveals that technology is used in many different ways, such as finding locations for establishing markets (for example, GPS pictures to find and define poor areas in which to build for-profit schools), providing standardised low-cost teaching for students (for example, prescribing teaching material and instructions for teachers to follow word for word), and creating new ways for consumers to pay for this education (for example, paying over the phone). The case of ICEF illustrates how technology is used for coordinating market actors (for example digital platforms to coordinate market encounters and meetings), as well as for communication, promotion, marketing, and so on.

Digital technologies are, in fact, used both for and in countless particular devices and the same technology can be a device in many different forms. For example a mobile phone can be a teaching device at the same time as a paying device. Cumulatively, technology and infrastructure enable ways for markets to work, expand and represents immense and as yet unimaginable opportunities. But most importantly, it is lubricating, enabling, and providing opportunities for the creation of new markets and commodities.

Data as a market device: Metrics that are drawn from data are a third key group of devices in the construction of markets. In the wider literature there is a great deal written on metrics, in particular the emergence of rankings, such as 'world class universities', or the OECD's Programme for International Student Assessment (PISA). What is particularly interesting is the way in which these devices generate data that are then repackaged and sold to governments and organisations wishing to do better, but also consultancy services are sold on how to do better in data-driven regimes of governing.

Riep calls these 'epistemic objects', where data-driven metrics serves the function of convincing and promoting market actors of the reputation and thus trustworthiness of products in particular markets. Verger, Steiner-Khamsi and Lubienski analyse this with respect to using data and metrics as ‘governing by numbers’ (Ozga 2009). Here numbers give an illusion of objectivity and are used as tools in governance and policy processes to legitimate. They are, therefore, devices used for normative and cognitive framing and reframing particular commodities and consequently constructing markets (Beckert 2009).

Strategies for Education Market-Making

There are countless strategies that particular actors use for education market-making and advancing their interests more generally. However, what is not often analysed or even noticed are the strategies of making education markets that use and colonise time and space in very specific and strategic ways.

Space and place as a market making strategy: The use of space, scale, place, the nature of their social relations, and strength or weakness of their boundaries, work as market-making strategies. All cases show how actors strategically pick and choose locations and spaces for their operations that are more likely to be potentially lucrative in market-making, or a weak point in the regulatory environment that might otherwise be hostile to markets. Actors also use rescaling as a strategy, to relocate, or locate their activities beyond those that might create impasses or generate frictions. Global trade negotiations are a good example here. Not only do many of the negotiators come from rather different departments (trade and not education), they are likely to operate at scales that are rather different to those actors engaged more directly in the governance of education. Rescaling is thus strategic, and when accompanied by devices and other market making tools, can be an effective means of making markets in the face of hostility.

Robertson’s paper shows how, over time, the regulatory frameworks that are maintained by government to enclose education as a public good are targeted, using discourses like the efficiency of the market, or the right for the poor to be choosers of private education. These market actors also examine where there are market opportunities, but also where there are more favourable environments in the sense of rules and policies, such as in the case of Liberia, with a well-disposed Education Minister willing to outsource Liberian education to for-profit actors, even in the face of international outcry (Pilling 2017). Similarly, the papers in this special issue show how markets strategically search for places and spaces, how they find particular places to institutionalise themselves and move across space. Capital not only needs uneven topography to re-invent itself and expand (Harvey 2006) but it produces uneven development as an outcome that can be further exploited in the development of capitalist markets.

When space is used as a market strategy, it also reframes that space from what it was before. For example, as Riep reveals, a village in Uganda is reframed into a market opportunity, and as such is assigned particular boundaries with new meanings. Hartmann also eloquently shows how using space, and more specifically a particular framing of space, turns boundaries for markets into barriers for markets, which can be overcome and hence markets can be expanded.

Time as a strategic resource in market-making: Any argument around inclusion of education more directly in market making and capital accumulation, suggests we look more closely at capitalism as a dynamic, and at its distinct temporal order; that of uncertainty and full of risk which needs to be contained, on the one hand, and yet its unknown exploited, on the other. In an emerging capitalist order, actors ranging from companies to entrepreneurs, investors, employees and consumers must all orient their activities to a more open and uncertain future. "The temporary disposition of economic actors toward the future, and the capability to fill this future with counterfactual economic imaginaries, is crucial to understanding both how capitalism diverges from the economic orders that preceded it, and its overall dynamic" (Beckert, 2016: 2). Making a market from education, where the idea of the future was shaped by notions such as social mobility or becoming someone, is dependent on a rather different conception of the future; one that can be sufficiently controlled so as to protect financial investments and return a profit. Robertson's paper highlights the way in which the current trade agreements all seek to lock in the trade architecture in such a way that it is difficult to remove it. A series of strategies and devices are deployed to do this work, including limiting the possibilities for the world of politics to claim the future for other alternative, potentially democratic, projects.

Networks and Investors Involved in Education Market-Making

Investments and networks play key roles in market-making processes besides market devices. Networks involved in market-making include state authorities, regional authorities such as the European Union, international organisations such as the World Bank, philanthropic organisations such as the Melinda and Bill Gates foundations, private corporations, investors, influential individuals, and so on.

The different contributors to this issue show an interesting fact about capital in the process of market-making. First, they scrutinise the investment capital that seeks returns-on-profit, but also philanthropic donations that have particular connections to specific companies and the actors behind them, and in this way seem more similar to investments rather than donations. Riep, Sellar and Verger, Steiner-Khamsi and Lubienski papers reveal how investors, on the one hand, benefit and profit from the education industry whilst at the same time they tailor it in particular ways benefitting their own strategies, on the other hand. The contributors also show how philanthropic donations, or even state aid, act as investments for particular companies to then sell products or expand markets. The British Department for International Development (DfID) has made a financial contribution to Bridge International Academies, a relationship that is not without controversy.

In the identified networks the role of the states remains important. States create rules and regulative opportunities for these markets to expand. But there is also another crucial role of the state. Most of the markets that are analysed in this special issue benefit from substantial public funding. In other words, the state often pays for commodities in these markets, or contributes substantial to the value of the commodity. This does not mean that these markets are not real. Rather, it means that states tailor, as well as finance, markets.

National and Regional State Agencies and the Politics of Market-Making

Two papers in this special issue are concerned with the regional and global making of markets and trade rules for education. Eva Hartmann explores the relationship between the European Single Market and the European Higher Education Area (EHEA), and particularly the role of the national higher education quality assurance agencies. Here we see how 'state' quality assurance agencies – therefore national bodies that are in principle non-profit – become market actors. However, construction of the higher education quality assurance market is complicated. We witness the struggle over state competencies, market arrangements, European control over national control, to name just a few points of contestation.

Susan Robertson analyses the inclusion of education in the current global trade negotiations, namely in the negotiations over the Trade in Services Agreement (TISA), the Trans-Pacific Partnership (TPP), the Comprehensive Economic Trade Agreement (CETA) and the Transatlantic Trade and Investment Partnership (TTIP). And whilst there are still many unknowns as to the overall outcomes of these negotiations, what is key here is the long-term back and forth movement for attempting to set up and institutionalise global rules of education trade that goes back to the World Trade Organization's (WTO) General Agreement on Trade in Services (GATS) beginning in 1995. Although education is a sector that is dear to the public and there are strong debates about its commodification, the powerful actors in the form of private companies, investors and particular countries constantly look for ways to institute trade in education and to build market institutions for education, locking them in national regulation via international rules. Possibly here we witness the ecological dominance of capitalism (Jessop 2014) in its finest.

Contesting Markets

Finally it is important to recognise that markets are full of frictions and struggles. Their imagining, construction and ongoing maintenance are dynamic, and never ending, processes. Each paper reveals the interplay of back and forth processes where particular actors advance markets while other resist. For example, Eva Hartmann shows how it took quite a few decades to construct the European market made up of quality assurance agencies, as some countries were opposing the idea to lose competency over their own higher education systems. But nevertheless the market was created at the European level in the broader, strategic and consistent project of constructing the European single market more generally. Curtis Riep also shows how particular actors and even states are resisting particular low cost schooling initiatives as they are worried about the effects of standardised approach designed in the USA. Robertson too shows the challenges facing the trade negotiators as sectors, like education, are viewed by protestors; as public and not private goods. Yet despite these protests, we nevertheless see those who are investing in new markets, or governments who will benefit from foreign investment, acting as strategic agents willing to advance market making by strategically negotiating in those forums that might make a difference. We thus see the dynamics of perpetual movement, with a common trend across the papers – that education markets are expanding - in variety, scope, scale, and size.

Conclusion

The panel presentations at CIES 2016 and their contributions to this special issue all in their own way engage with different sites and social processes as the basis for studying market-making and trade. Each of these papers contributes to enhancing our theoretical and conceptual approaches to studying market-making and trading in education services. Our hope is that in refining our theoretical tools in this way, we are able to better reveal complex processes at work, and in doing so contribute to new insights on market-making in education as a complex social process. As the editors, we wish to thank all of the authors for their outstanding contributions.

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