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In the footsteps of the world education market

by Agnès Cavet

Following the example of culture, health and scientific research, the education sector seems gradually to be overcome by a form of discourse and demands that were formerly reserved for industrial and commercial activities: economic rationality, performance management, efficiency, output, return on investment, etc. In parallel with this, new methods for regulating education systems in Western countries and a general climate of budgetary austerity are leading schools and universities to outsource some of their missions, to set up partnerships with companies or to even call upon private donations.

As the future labour force for the economy but already consumers in the fullest sense of the word, pupils and students provide a formidable market potential which is arousing the interest of the new businessmen. Globalisation is accentuating this process, introducing large-scale competition between private or public training offers, and, beyond that, between States, which are unceasingly involved in making international comparisons and league tables.

While these processes have already caused an abundant amount of ink to be spilled, oscillating between theoretical analyses, controversial standpoints and alarmist interpretations, we have chosen a more pragmatic approach, by concentrating in this issue on the *observable signs* of market logic at work in education, in France and elsewhere in the world.

So our investigation will therefore move forward *in the footsteps* of the education market, organized along two lines of enquiry: *the privatisation* of teaching, followed by the *internationalisation* of markets.

What role does private education play and what place does it occupy today within the education system, from school to university? What new relationships are being created between the public education sector and private partners? By what forms and under what kinds of pressure is the educational market becoming internationalised? Is distance learning achieving the "revolution" of the market that has so often been announced? And, finally, to what extent do the realities observed justify the recurring fears of education becoming "commodified"?

This issue offers a current viewpoint on these questions through a review of the literature in French and in English.

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"The greatest market on the planet"?

In the late 1990s, Glenn Jones, an American cable TV tycoon, stated that: "*education is the greatest market on earth, the one that is growing quickest and in which those at present working in it do not meet with the demand*". Is this a realistic observation, a cynical vision, or a declaration of war? Taken up at every possible opportunity, this short phrase has at any rate made a strong impression on people's minds.

The market is indeed a huge one if one considers the ever-growing number of young people to be educated: since 1950, the number of students and pupils in the world has increased from 6 to 90 million. The market is also a huge one when one looks at world expenditure on education, estimated at more than 2,000 billion dollars per year (Hugon, 2003).

One of the indicators of the OECD 2008 report shows that expenditure on education represents from 4% to 8% of the GDP of the Member States. North America, Switzerland, Austria, Northern Europe, Japan, Australia, the Netherlands and France are the countries in which expenditure per pupil per student is the highest. Taking into consideration all levels of study, this expenditure is on average over $8,000 per year in the OECD. Still as an average, complete schooling from primary to secondary school is said to represent a total expenditure of $87,700 per child, while higher education would work out at $47,000.

Even if it is clear that educational "expenditure" does not rhyme with potential "turnover", it can readily be understood that the sums at stake are such as to whet the appetite of people involved in business, all the more so as they are spread all over the planet. An estimated 90% of expenditure on education is thought to come under the controlled area of public funding, which would mean that 10% would be available for the competitive market.

And can one in any case really talk about a "market", in the economic sense? It would seem that the standard concept of market is rather poorly suited to the specific features of the field of education. In particular, the price of the educational "goods" cannot be used to regulate supply and demand in a context of compulsory education. This is why the hybrid concept of "quasi-market" is generally preferred by economists since it presupposes neither a price nor a financial relationship between provider and consumer. Maroy uses the notion of "area of competitive interdependences" to qualify the socio-economic arena of "educational markets" (Maroy, 2006).

But it is not the purpose of this issue to go any further into the theory. It is not a question here of seeking structural models and decisive factors to explain the emergence of a neo-liberal school on a worldwide scale, just as it is not our aim to reason abstractedly on the possible hazards that "commodifying" education could make pupils and students, education systems, and society as a whole incur. Such work has already given rise to a large amount of literature and has its arenas for public debate via militant organisations.

As Bernard Charlot (2006) notes, "*the debate on neoliberalism is often more controversial than analytical*". This is why it proves to be necessary to get some distance on the ideological rhetoric, no matter how relevant the theses which they put forward. We have therefore chosen a more pragmatic approach, looking for indicators, no matter how slight, which might reveal the presence of new approaches in the relationships between education and market. Preference is therefore given to scientific work based on factual observations, surveys, comparisons, examples, and data.

Two lines of enquiry seem, on the face of it, to be worth pursuing: first of all, the *privatisation* of school and university education, followed by its *internationalisation*, which mainly involves higher education.

To try to dissociate setting out the facts from interpreting them does not, however, mean giving up on an analytical approach. We will therefore attempt, in the conclusion, to bring out some thinking on the trends which are emerging. In particular, we will be questioning the relevance of simplistic terms in which the debate is often couched. Is the public/private split, expressed in terms of an opposition between civic values and mercantile profits, between public property and goods really of any use to give an account of the situations observed? And doesn't focusing the debate on the question of "commodification" tend to mask other, much more worrying phenomena?

Privatising education: what are the new trends?

School teaching: a private sector in areas where the public sector has failed

The latest indicators provided by the OECD make it possible to analyse expenditure on education by the Member States, distinguishing public funding and private participation.

In two countries, Sweden and Portugal, there is zero investment from the private sector. At the other extreme, private sector investment amounts to over a quarter in Chile and in Korea. Germany, Mexico, the United Kingdom, Australia, New Zealand and Japan come next, with private investment accounting for 10% to 20%. The average is 8.5% for the OECD zone, and to 6.4% for Europe. In contrast to generally accepted ideas, the United States occupies an average position, with private investment accounting for 9%. France is next with 7.5%. As for variations between 2000 and 2005, these are globally not very significant, sometimes tending upwards and sometimes downwards. Only the United Kingdom, Mexico and Slovenia show a strong move towards the private sector, especially the latter, where private funding moved from 2.5% to nearly 14% in five years.

In France: a sector that is regulated, but which features some opportunist zapping

In France, the majority of private primary and secondary schools are "under contract" to the State, which provides most of their funding, mainly by remunerating the teaching staff. According to François Dubet (2007) "*private schools accommodate nearly 20% of pupils as a stock and nearly 40% as a flow*", which amounts to saying that at any given time 20% of pupils are studying in the private sector but that 40% will spend some time in it at some point during their schooling. "*Private education functions less as a religious alternative than as a "normal" option which one can take up when the public offering is no longer deemed to be satisfactory*". For Gauthier & Robert (2005), this "zapping" between public and private sectors bears witness to an "*attenuation of the ideological cleavage between the two schools*". It is justified in families by "*consumer reasoning or calculations of interests*" aiming at "*the best chances for children's success*". Currently, then, private education provides something of an emulation factor, an "*incentive to do better*" addressed to public education. The authors conclude from this that private education under contract plays a systemic, complex role, which is not that of the commodification of the offer.

On the other hand, the two researchers observe the breakthrough of an open education market, made up of institutions, and the sale of private lessons and services, each in competition with the other, and with public authorities. These institutions are rare in primary education, but more frequent at secondary level, where they are seen as factories for churning out the baccalaureat. While private education not under contract concerns only 1% of pupils in France, the authors express concern about the 6% observed in Paris, which could be the start of an emerging trend (Gauthier & Robert, 2005).

Education vouchers: various experiments throughout the world

Richard Hatcher (2004) shows how the system of **education vouchers** is tending to push education towards privatisation in certain countries.

The principle of education vouchers is a simple one: instead of subsidising institutions, the State subsidises parents, issuing a voucher with which they can register their child in the school of their choice. Depending on the context in which it is applied and the conditions in which the vouchers can be granted this system can be made to serve very different objectives.

In **Denmark** and in **Sweden**, education vouchers are a form of subsidy. They allow pupils to be registered in public schools as well as in private ones, the latter being not-for-profit organisations.

In **Chile**, education vouchers have been in use for nearly 30 years. An economic study performed over a long period (Bravo *et al.*, 2008) shows that the education voucher programme has allowed more recipients to access subsidized private schools, attain a higher academic level, obtain higher wages (+7%) and take greater part in the labour force. The programme also seems to have produced positive effects both in public education and in private education, reducing the differences in level between the two sectors. It appears however that while the system is of benefit to all, the advantages that the poorest obtain from it are less than those obtained by pupils from more privileged families.

In the **United States**, education vouchers are being tested in sectors marked by strong economic, social and cultural segregation. The largest programme was developed in the early 1990s in Wisconsin. It is offered to families whose incomes are 175% below the federal level of poverty and allows them to send their children to a private school. Initially, religious schools were excluded from the programme but they were subsequently included in it. In 2004, 12% of the pupils of Milwaukee used education vouchers, for an amount fixed at $5,800 per year (Hatcher, 2004).

According to Rouse & Barrow (2009), education voucher programmes today concern 66,000 pupils in the United States. However, when analysing the research work published on the issue over the last 10 years, the researchers concluded that these programmes did not have any convincing effects on pupils.

Supported by conservative foundations such as the *Bradley foundation, Heritage foundation* and *Landmark legal foundation*, education vouchers attract the interest of companies which invest in for-profit education - we will come back to this later. They provide a strategic argument in opinion campaigns in favour of the free choice of school and the liberalisation of the public education service. *"Education vouchers may be regarded as an extension of democracy, defined in terms of consumerism. But it is a concept of democracy that is defined both by 'class' and by 'race'"* Hatcher notes. The author underlines "the discursive ambivalence" of the concept of "choice". *"The critics of the system regard this attraction for the interests of equality as a tactic*" in favour of more widespread use of education vouchers, and to allow *"white lower-middle class families* [...] *to leave the public schools and* [...] *to receive grants for places in private schools for an elite".*

In the **United Kingdom**, the current education system already offers "*choice and diversity* [...] *by local educational markets combining various types of schools*", including denominational schools, directed according to parental choices. Under the Thatcher government, an experiment with education vouchers had to be abandoned, but the principle was to continue to interest politicians. It seems to be *"a way of promoting the interests* *of underprivileged pupils from an educational point of view, while safeguarding and subsidizing the privileges of the middle-class*" (Hatcher, 2004).

Charter schools: in vogue in North America

Over the last fifteen years, a new type of school has appeared in North America: charter schools. These are created and run by private individuals but completely financed by public funds. They are to some extent para-public.

In the United States, their existence depends initially on a State law. Each school then signs a "charter" with the district, which defines how autonomous it is to be in decisions about management, recruitment, curriculum and pedagogy. In return, the school must submit to regular assessments, which condition the renewal of its contract. In 2004, Michigan and Arizona were home to over half of the charter schools, because of the more permissive laws in force in these states.

An interesting analysis of these schools is provided by Denis Meuret (2005), from various studies carried out in the United States. Launched in the 1990s, charter schools continue to multiply. Between 2000 and 2004, their number increased from 2,000 to 3,000, with 600,000 pupils. Nearly a third of the schools had a previous existence as public (20%) or private (10%) schools before signing the charter, but 70% are new schools.

Certain schools are founded by teachers or by parents; others are run by private companies. What really characterizes these schools seems to have more to do with their pedagogical independence than with their financial independence – the latter being conditional upon state funding. These schools cover a large variety of objectives, publics, cultural and/or educational choices that are to a greater or lesser extent "alternative" when compared with public education: how pupils who drop out, who are in difficulty and/or who come from underprivileged backgrounds are treated, a minority or religious identity, special courses in certain disciplines (technology, arts), progressive or more traditionalist approaches to teaching, etc. 8% of the schools are virtual ones, which provide distance learning.
All in all, pupils, parents and teachers of charter schools appear fairly satisfied with their school. Although the capacity for innovative teaching is one of the arguments often put forward, or even recommended, evaluations show that this remains fairly limited. For Meuret, charter schools "*have provided answers to marginal requests. It may therefore be thought that they have contributed to equity and freedom and that their political standing is positive*". But "*their economic standing is weaker:* ***for a similar cost*** [...] ***it is not proven that they show greater teaching efficiency than the other public schools****, and one has a hard time perceiving in the way the latter operate any of the benefits of competition from charter schools".*

Unlike the education voucher programmes, charter schools are seen more positively by the population and by politicians, both republican and democratic, even if the approaches which prevail are not the same in both camps. The first see *"the means of promoting market-based regulation in a more acceptable way than with* vouchers" while the second appreciate a means "*of giving users a choice of school, in a less dangerous way for the public service than vouchers*". So in both ways, it is by reference to education vouchers that charter schools are put into perspective. For Meuret, "*giving* vouchers *to allow people to go to private schools, is to prevent users from finding a solution to their problem in a public school other than that of their sector, to combine public funding with a private educational output, and not only, as in the English* concept of *school choice, to organize competition between public schools*".

Private management of public schools: a new trend?

Since 1995, experiments have been tried in the United States and the United Kingdom, involving outsourcing some or all of the administration functions of a public school. At as simple level, outsourcing can be limited to certain fields of management, sub-contracted to companies designated as "*vendors*": accountancy, pay, legal and financial advice, staff recruitment, in-service training, etc.

But the outsourcing can also be total, when the entire management and running of the institution is entrusted to a private organisation. In the United States, this principle of outsourcing was started by certain districts with the aim to some extent of daring any private initiative to provide effective answers to difficult situations: schools accommodating disadvantaged pupils, marked by educational failure. These are, then, attempts which follow the approach of the *No child left behind* scheme. The principle is as follows: the district contracts out the management of a public school to a private organisation, and allocates a budget based on a flat rate per pupil. The contract comes with "measurable objectives" that the organisation must reach within a time limit, failing which its contract is not renewed. Such schools are called *contract schools*.

Great Britain has been also been committed for more than ten years to a policy aiming at broadening the role of the private sector, via public-private partnerships and outsourcing management services. According to Fitz & Beers (2002), these conditions have provided private organisations with opportunities, enabling them to be hired for - or to take hold of - the management of schools and administrative services previously handled by the local authorities. Privatisation in the United Kingdom has provided a form of political answer to the accusations directed at public education. But managing schools or local educational authorities does not prove financially worthwhile for the private sector. The main entities involved therefore tend to be not-for-profit organisations, which exploit and control only a limited number of institutions. In this sense, the authors believe that these private entities have not yet transformed the landscape of British public education.

New organisations on the scene: EMOs or "edupreneurs"

Of the private organisations which are investing in the creation and the management of schools, a profile specific to the United States and the United Kingdom stands out: these are "*education management organisations*". They are companies working in an area that they themselves refer to as *for-profit education*.

According to Molnar, it was *Wall Street* that introduced this generic name EMOs, by analogy with companies performing a similar role in the field of health: *health management organisations (HMOs)* (2004 report).

In secondary education, EMOs are to be found at the head of charter schools and public schools under contract. In both cases, these are therefore publicly funded, but privately managed. Public administration intervenes downstream, at the results assessment stage. Other EMOs are also involved in higher education, as will be seen later.

Over the last ten years or so, under the supervision of Alex Molnar, three research teams have been closely following the development and the activities of EMOs. They publish an annual report, *Profiles of For-Profit Education Management Companies*, which is an invaluable source of information. We learn that EMOs have developed by leaning on a vast capital market, which has encouraged the prevalence of large firms. For 10 years, the sector has been restructuring, with mergers and buy-outs of small or medium-sized EMOs. The 2008 report counts 50 EMOs at the head of 553 schools in 28 States, accommodating nearly 255,000 pupils, particularly in primary education.

Comparing the reports of different years, it can be seen that, initially, EMOs attempted to invest the field of public schools under contract. This true particularly of the powerful firm *Edison Learning* (formerly *Edison Schools*), which in 2002-03 managed 76 public schools (2003 report). This company built its reputation by undertaking to greatly improve the level of education and the results in tests for schools hit by educational failure. Its method involved providing each pupil with a personal computer, extending school time and giving training courses to teachers during their holiday time (Meuret, Broccolochi & Duru-Bellat, 2001). However, it did not necessarily achieve the hoped-for results. For 5 years, *Edison* has been losing contracts each year, but it still manages 49 *contract schools* (2008 report).

The public school market proves more difficult than that of the charter schools, which combine independence with the security of public funding. EMO activity is therefore little by little turning towards the charter schools (85% of the activity in 2008, as against 74% in 2003).

In the USA, the *Cato institute* is one of most powerful libertarian think tanks, whose stated aims are to defend "*individual liberty, free markets and peace*". The review *Policy analysis* published by this organisation devotes several articles to education. In one of them, Carrie Lips emphasizes opportunities available to "*edupreneurs*" to create private schools, especially through charter schools. In very unabashed terms, the creation of schools is here encouraged using declared ideological and/or teaching options as a marketing principle. Deemed particularly interesting are areas in which public education provides answers which do not satisfy all parents: morals, religion, multiculturalism, sex education, learning to read, - and why not teaching evolution? The author points out that there are as many potential "niches" as there are trends of opinion, each one likely to be subscribed to by a category of parents, and therefore to fill up classes fairly easily. Arguments are also put forward encouraging parents to take back control of "*their education dollars*".

According to Molnar (in Boyles, 2005), the key words which emanate from the commercial logic and saturate the rhetoric of EMOs are "*accountability*", "*cost-effectiveness*", "*efficiency*". For these companies, teaching is above all an "*output*". Some give more consideration to the parents, who are their "customers", than to children, who are their pupils. In this sense, the catch line of the *Education industry association* is noteworthy: it presents itself as "*the premier organization of education entrepreneurs who deliver service, innovation and results to families and schools*".

But a serious problem arises for EMOs when they are **caught between the need for offering a quality educational programme to all pupils and pressure from their shareholders** who push them to obtain the best profits. *Edison*, in particular, has encountered serious disappointment, its shares losing 98% of their value during 2002 (2004 report). For Molnar (in Boyles, 2005), this is the basic problem: a school cannot **serve two masters** because the requirements of democracy are fundamentally different from those of for-profit companies.

For Fitz & Beers (2002), the main success of EMOs is perhaps to have shown their capacity to create a parallel system to that of public schools and to have convinced politicians that there is another way of tackling educational problems. This is a position which EMOs are trying to consolidate by supporting reforms which will liberalize the choice of school and will generalize the principle of redistributing education funds to parents, which they feel would allow secondary education to be more privatised.

Leslee Trammell (in Boyles, 2005) denounces the support that these EMOs receive from large firms such as *Exxon Mobil*. These bring their weight to bear in the debate on education by means of huge advertising campaigns, which point the finger at the deficiencies of public education and manipulate opinion with a view to directing educational reforms towards greater deregulation. The author notes the deplorable effects of these campaigns and the large efforts required to help pupils, students and the general public to analyse, decipher and deconstruct the ideological rhetoric imposed by these powerful companies.
Judy Block (in Boyles, 2005) analyses these persuasion strategies in detail. Referring to the theories of the "just war", she draws a worrying parallel between the methods used by politicians to justify and programme the

stages of a “just war” and those adopted by ultra-liberal lobbies to call for the dismantling of public school and the rebuilding of a market-based education system. To legitimate these reforms, the defects of the public school are systematically exaggerated, and it is made responsible for all the evils of society and the economy. The reconstruction plan for the liberal school is, in contrast, completely idealised. And since any war, no matter how “just”, cannot take place without victims, the author fears that pupils will be sacrificed as inevitable “collateral damage”.

Lynn Wilson (in Boyles, 2005) also shows how conservative *think tanks* (*Heritage foundation*, *Hudson institute*, *Cato institute*, *American enterprise institute*, *Brooking institutions*) sponsor governments and influence the communication of education policies, as well as how information and reports which are made public are sorted.

❑ See also

Some recent publications on the question of the choice of school:

- a collection of ten reports on the various types of schools in the USA, published in 2008 by EPRUs (*Education policy research unit*), EPIC (*Education and the public interest center*) and *Great Lakes*;
- Rey Olivier (2008). “Le choix de l'école ne repose pas sur les performances scolaires”. *Écrans de veille en éducation*. <http://www.inrp.fr/vst/blog/2008/01/08/le_choix_de_l_ecole_ne_repose_pas_sur_le/> ;
- Bacconnier Brigitte, Marguerite Hélène & Geoffroy Géraldine (2008) “Carte scolaire et aménagement des territoires", *Dossier d'actualité de la VST,* n° 32, january.

At the school of advertising

❑ School comes to advertising...

Several authors report that advertising has become a regular and perfectly accepted practice by which, in North America, in Australia and in other countries, schools - and academics - try to attract pupils and, in so doing, attract funding and a good reputation. They carry out publicity campaigns in the press and the media, and distribute leaflets and luxurious brochures at education fairs. While the methods used are not always too heavy-handed, it is nonetheless true than the marketing item takes up more and more of the budget of many institutions (Kenway & Bullen, 2003 ; Molnar in Boyles, 2005 ; Newfield 2007).

❑ ... and advertising comes to schools

In Australia and the United States, certain schools agree to rent out publicity spaces to brands, which are then displayed on their walls and inside their walls. It is sometimes under pressure from the sponsors that administrators are required to accept this concession. But it may also be an easy means to bring additional income into the school cash box. It is true that the administrators are supposed to be selective and authorize only publicity campaigns in favour of educational products. But Jane Kenway & Elizabeth Bullen (2003) show how marketing specialists get round this reserve. More and more firms without any educational vocation have started targeting the school register, putting an educational “gloss” on products which are not necessarily designed to meet the needs of the educational environment. In this way, entertainment products, apparently without any cultural pretension, are repackaged and recontextualised to give them justification and a supposedly educational function. Reformatted to suit the codes of the educational market, these products find their way onto the advertising boards of schools and, more generally, onto the educational consumption market.

The two Australian researchers carried out a survey on pupils to find out the impact of these publicity campaigns within the school itself. It appears that the young people questioned prove more skilled at recognising advertising intentions and less sensitive to marketing in school than adults. Parents more easily let themselves be taken in than their children by the educational dimension - real or supposed – of consumer goods, all the more so if they are enhanced by the school which advertises them.

Kenway and Bullen conclude as follows: “*At the same time as the school is used by producers to sell products to consumers, school studients have become commodities sold by schools and systems to producers...*”. A phenomenon which the commentator Philip Adams calls “*corporate paedophilia*”, in other words “*mass molestation of the innocent as mighty corporations turn youngsters into economic units*” (quoted by Kenway & Bullen, 2003).

The extra-curricular sector

Before tackling the field of higher education, it is worthwhile taking a look at the extra-curricular sector, a commercial sector whose activity takes place outside school but which also tends to thrive on the failings of secondary education.

Extra-curricular publishing: a substitute for textbooks which has found favour with parents

In France, Gauthier and Robert (2005, p. 93-100) observe that the extra-curricular publishing sector has experienced very strong growth over the last 15 years. They draw a parallel between this development and the progressive abandonment of textbooks within school itself. Teacher training has indeed encouraged teachers to distance themselves from pre-existing teaching materials and develop their own. This is a trend which has led to: excessive photocopying, the cost of which is seldom set against the cost of a textbook; pupils being given a mixture of not always structured materials; books being a less common feature in the familiar universe of the pupil, etc. In the end, parents are the ones who demand extra-curricular materials, that they regard as reassuring.

In the field of **written media**, extra-curricular publishing proposes a broad range of "*holiday workbooks and tuition books, methods and guides, books for revision and practice, past examination papers, reference books, classics with accompanying notes, in paperback editions…*". In 2002, this market represented 20.7 million books sold, for a turnover of €81.24 million.

For Gauthier and Robert, only some of these materials concern the "anguish market". This is particularly true of holiday workbooks, which provide a "juicy" market. Holiday workbooks require little initial investment (which can be recycled over 4 or 5 years), are inexpensive in terms of advertising, are sold at an affordable price (4 to 8 euros), and can count on a wide distribution over a very short period through the network of medium-sized shops and supermarkets (80% of total sales). They are still attractive products because of their "fun" aspect: so they sell well (4.5 million copies sold in 2002). But their effectiveness is disputed by an Irédu study (Jarousse & Leroy-Audouin, 2001), which shows that these books have any educational value only if they are followed up to the end, which is the case for only one in four. In addition, the researchers note that **it is the pupils who need them the least that benefit from them the most.**

The fast-growing area of tutoring or training books belongs, according to, Gauthier and Robert to the same kind of "society trend" as recourse to private, after-school tutoring. In particular, multidisciplinary exercise books give *"the feeling that an entire school-year programme can be mastered synthetically*". The researchers are concerned about the success of such books right from nursery school level, supported by *"the universal belief that everything is determined before the age of six*".

In the field of **digital media**, Gauthier and Robert point to a very volatile situation. On the market, are to be found the familiar, big multi-media publishers, who attempt to develop online services from which they expect some substantial benefit, private specialized editors and also non-specialized groups such as France Telecom, Boulanger, Renault, or EDF.

The offer from private service providers is similar to an on-line after-school tutoring service. It is mainly aimed at individual clients and may take various forms: revision, training, or cramming services; teaching materials consultable on line or downloadable; forums, chats, exchanges of emails with teachers or tutors; advice given to parents. Clients can sign up for a flat rate for unlimited use, or use specific services, via a payment by a points system.

However, paradoxically, while this market was regarded as very "promising" for companies, it has not really taken off in France. The authors discern in this parents' persistent attachment to learning with a teacher physically present, and the public's reluctance to pay for what it can find for free. There are many sites developed by teachers, alone or in association, which provide advice, give access to resources, organize forums and set written homework or offer help solving questions (Sosphilo, Webmaths, etc.) (Gauthier & Robert, 2005). These free sites operate using a method of exchange and sharing, within a community of learners (Archambault, 2005).

After-school tutoring: a market in the shadows

The special question of public and private after-school tutoring in France and throughout the world has already been dealt with in a previous *Dossier d'actualité*, which the reader might like to refer to (Cavet, 2006).

More recently, we gave an account of the questions posed **in France** by government aid provided for private after-school tutoring as part of the Social Cohesion scheme, launched in 2005 to stimulate job creation by the development of "personal services". Between "employment-service vouchers" and tax breaks granted to families, it appears that the ones who benefit most from the current system are the most well-off families and private after-school tutoring companies. This has led the CERC (*Conseil emploi revenus cohésion sociale* - Council for employment, income and social cohesion) to question *"the consistency of government aid*" when this merely reinforces the double cultural and social split in the population of schools. **In 2006, government aid granted to private forms of after-school tutoring amounted to "*240 million euros a year, or almost two-and-half times the budget for public after-school tutoring and almost a quarter of that granted to priority education areas*"** (CERC, 2008, p. 133).

Higher education: worldwide growth of the private sector

If one looks at the OECD indicators on how private/public expenditure on education is broken down, the situation of higher education appears a singular one. The relative order of the countries is fairly similar but the rates of private funding are much higher: 85% in Chile, 65% in Japan, 52% in Australia, 33% in the United Kingdom. The United States is here among the front-runners, almost level with Japan. France comes within the last third, with 16%, the OECD average being 27%. In terms of growth between 2000 and 2005, the private share is on the increase almost everywhere, sometimes very significantly. On average, the increase is 2.5% in Europe and 5% for all OECD countries.

The partition between private and public expenditure on higher education does not follow a clear one-to-one correspondence with the partition between private and public institutions. Even in public universities, enrolment is generally fee-based and leads to greater expenditure for families. In spite of grants and assistance available to some, the cost of higher education more and more often means that students have to take out a loan, which they will need several years of professional activity to pay back. This is one factor which contributes to the feeling that studies are an "investment" in one's professional future, an investment which needs to be made intelligently in order to obtain a sufficiently well-paid employment to be able to amortise the cost.

Having said this, the increase in private expenditure that the OECD figures show is not uncorrelated with the development of the private sector, that all the studies that we have consulted bear witness to. Higher education seems the most open to the market and the growth of private offers. As the final stage before employment, it is more in tune with the world of the economy and employment, whose trends towards internationalisation it follows.

In France

It is in post-secondary education that a totally private offer "*on a scale never yet seen in this country*" is developing the most: from classes offering preparation for entrance examinations to higher education establishments (*écoles supérieures*), via vocational schools. The most frequently proposed courses are those turned towards services: trade, accountancy, management, communication, tourism, personal services, body-care, consulting or sales. Certain schools are part of a *grande école*, in connection with their department preparing vocational diplomas (*BTS*). Others have a direct relationship with a chamber of commerce and industry (business schools). Annual fees of 4,000 euros are not rare (Gauthier & Robert, 2005). University courses requiring an entrance examination (medicine, paramedical studies, social or political sciences, school teaching, etc) also encourage the development of private institutions specialising in preparing entrance examinations. In the first years of medicine, for example, many students sign up for "cramming schools" in parallel with the university. They receive extra lessons, intensive training and regular tests; they can also make use of rooms for individual work. The success of these dispensaries is due to individual supervision that they provide for students, supervision not being the primary concern of universities.

In the public sector, universities have been able, since the Faure law of 1968, to call upon private funds. However, the 2007 law on the freedom and responsibilities of universities gave a boost to this possibility by linking it to an advantageous tax break for donations. The latter may emanate from university foundations or foundations created in partnership with companies.

Lyon 1 university was one of the first to create such a foundation, in partnership with four companies in the region. "*We intend to make the Foundation a place for experimentation of these private-public partnerships which need to drive the knowledge society*", explains Lionel Collet, president of Lyon 1. Benefactors can choose to assign their gifts to one of the twelve subject area projects defined by the university. The Danish company which is currently the largest benefactor allocates its funds to a chair of excellence in economy and health. Donations may also be assigned to grants for students with financial problems. This was what a third of the donation made by a very famous American software firm was dedicated to. As for the influence of this funding on course content and the choice of educational methods, the education director of the aforementioned firm states that Lyon I is authorised to choose: "*We will provide educational content with* [name of the product] *that teachers will be free to use or not. It is the same thing for freeware: the university can use it if it wishes to do so*".

Other institutions such as the universities Toulouse 1, Clermont-Ferrand, Perpignan and the Toulouse Insa have also created foundations and this movement will certainly be continuing in the years to come.

In an article in the Observatoire Boivigny, David Allais analyses the recent fund-raising campaigns carried out by the Catholic University of Leuwen and concludes: *"The main pitfall to be avoided is the confusion between patronage and sponsoring.* ***A patron will support training in whose work he is interested; a sponsor wants to put himself forward and to draw direct benefit from it***". This is a distinction which could prove to be relevant in making an initial assessment of the action of university foundations in France, a few years hence.

In Europe

Benedetto Lepori (2008) carried out a comparative study on the changes in the ways of funding universities in eight European countries: **Germany, Spain, the Netherlands, Italy, Switzerland, Norway, the Czech Republic** and the United Kingdom. He observes a trend towards limiting public resources, which encourages institutions to provide their own resources, via enrolment fees, research contracts and donations. However, while the trend is a visible one, "*it would not be true to speak of a withdrawal by the State* [...] *nor of widespread recourse to the private sector as a primary source of funding*". On the other hand, he identifies a move towards a more competitive model for allocating public resources which, while it remains mainly based on the number of students, makes a larger share of funding conditional on performance criteria. Only the **United Kingdom** seems to be a special case, where *"the combination of a reduction in basic funding by the State, the progressive liberalisation of enrolment fees and competitive and selective research funding*" leads to an increasingly clear specialisation and differentiation between institutions specialising in research and others in teaching.

This special feature of higher education in the United Kingdom is explored in more detail by Rajani Naidoo (2008). The large-scale recourse to enrolment fees for students and the procedures implemented to improve quality and efficiency are viewed by her as *"the introduction of a consumerist framework*", through which higher education is to contribute to the competitiveness of the United Kingdom at international level. The government has encouraged Funding Councils to publish many indicators on the performance of institutions (selection criteria, failure rate, supervision ratios, funds allocated to libraries and IT equipment, etc), on the grounds that students need *"information on the quality and the relevance of the 'higher education' product in order to be able to behave as enlightened consumers*". The impact of university league tables is also inciting certain institutions to make large investments so as to obtain a better score. Efforts are then focussed on improving housing, sports, leisure facilities, etc. Moreover, students' rights have been strengthened by the institutionalisation of complaint and rectification procedures… and appeals before the courts are on the increase. Naidoo puts forth the hypothesis that these consumerist mechanisms encourage students "*to demand a high-quality offer and to put pressure on institutions so that the courses proposed enable them to acquire the necessary competencies on the job market*". However, the first research undertaken in this direction suggests that consumerism may also "*attack innovation, promote passive and instrumental attitudes with regard to training, threaten academic principles and increase power struggles and imbalances between academics*". In conclusion, Naidoo notes that the reform of higher education provides the singular example of an interaction between market mechanisms and official intervention, which is a step in the direction of "*two modes of control* [which] *seem to grow simultaneously*" but which, in the current phase, reinforce the dominant position of the State. "*Although commercial mechanisms have been presented by the government as a means of injecting more flexibility, competition, diversity and reactivity into the higher education system, we are still awaiting concrete results, the institutions having conformed more to bureaucratic control than they have reacted to the market*". Only elite universities which have tasted the market "*may well be tempted to decrease their financial dependence on the State and to reject any form of responsibility with regard to the government*".

In **Central and Eastern Europe**, Marek Kwiek (2008) notes that a large private sector has developed in higher education since the fall of the Communist regimes: in 2004, there were over 700 "entrepreneurial universities" in the region, accessible, depending on the country, to between 10% and 32% of students. But the position of the private offer appears very different from that which can be observed in Western Europe. Kwieck shows that the private sector has played a crucial role in equitable access to higher education, opening the door to many students who did not hitherto have access to university, this being reserved by the Communist governments for an elite. But this privatisation has also had the effect of freeing the State by "*transferring the burden of education onto the consumers*". These institutions are almost exclusively financed by school fees paid by students, and concentrate on the activity of teaching, to the detriment of research, which is likely to widen the gap between east and west. On the other hand, they adapt easily to demand: "*short-term classes, double diplomas, distance learning, part-time education at the weekend*". In addition, these institutions "*take advantage of public relations and marketing techniques to gain significant shares of local, regional or national educational markets and prepare their graduates for living and working with the reality of the market*".

Christine Musselin (2008) sums up the **three directions which dominate approaches to the privatisation of higher education in Europe**:

- **creation and development of private institutions**, encouraged to counter the insufficiency of public institutions and to open up tertiary education to a greater number. This direction corresponds to the situation of Portugal and former-Communist Europe. These entrepreneurial universities often set up in particular specialised niches, and are not comparable with the large public universities: their range of courses is not complete but is directed chiefly towards professional training. In addition, research activity in these institutions is very limited, or even non-existent;
- **recourse to private funds** to diversify the institutions' resources, by increasing fees, opening up to patronage or obtaining research and development contracts;
- **adopting modes of governance and management from the private sector**, by transforming the vocabulary but also by introducing commercial or quasi-commercial mechanisms into higher education management and steering. This is shown by the trend to make a more significant part of university funding conditional on the results that they obtain and on the performance of their management. Also part of this approach is the tendency to favour "better" institutions, able to convey the image of national higher education beyond its borders. This is therefore an in-depth transformation of the representation model: "*the idea of a relatively undifferentiated national system has been replaced by that of competitive institutions fighting over rare resources and seeking to create strategic niches*" (Musselin, 2008).

The trend towards the **autonomisation** of public universities, already effective in the Netherlands, Austria, Italy and France, is consistent with the last two trends. For the researcher, the withdrawal of public authorities from university business is too often seen as a sign of the State's disengagement, whereas it in fact corresponds to the State's ambition *to transform the relations* between those who are active in public or political life and higher education institutions. So it is a question **of moving away from a State that *prescribes rules* upstream to a State that *regulates and appraises results* downstream**, which encourages partnerships insofar as they can be made to serve a goal of raising the efficiency of higher education, and the will to obtain better positioning on the international scene.
International competition does indeed provide an increasingly powerful spur in higher education policies, not only in Europe but in the majority of the richest countries, as we will see later.

In Latin America

In **Brazil**, dos Santos Tinôco (in AFIRSE, 2006) explains the development of private higher education by an increase in demand and the emergence of new needs in terms of knowledge and competencies. The number of private institutions doubled between 1995 and 2003, with the new institutions being concentrated in the richest areas. But the researcher notes that the quality of teaching in these institutions is often questioned. With their sights set above all on profitability, these institutions prefer to invest in structures and equipment rather than in operating expenses. So classes are very big and the level of teacher training is relatively low. In spite of this, demand remains high because of the great difficulties which young Brazilians encounter in joining the job market.

Didricksson (in AFIRSE, 2006) observes the same trends throughout **Latin America**: the hugely inadequate budgets allocated to public universities have opened the door to the development of a private offer. Based on the WTO agreements, foreign universities and multinational groups are setting up in the area, particularly in **Mexico**, to offer educational services to national students. This makes for "*the presence in the national offer of a sales force of economically very powerful foreign suppliers, such as* Sylvan international university (Laureate Inc.) *and* Apolo corporation*, whose main objective is a purely lucrative one*". So a network of franchised institutions is developing, controlled by these powerful groups. One of them has successively bought out the ten campuses of the *Universidad del Valle de México*.
As a result of the competition that institutions are waging, it turns out that the technological Institute of Monterrey, the most important private university in Mexico, is sometimes perceived as "more national" than the famous UNAM, the autonomous national university of Mexico. For the author, privatisation is leading to very unfavourable effects on the environment of the area. "*Public universities appear as problematic entities and of doubtful quality, whereas private universities are credited with an aura not only of excellence but also of control and discipline*". Mentalities are changing from a perspective of public interest to one of commercial interest. "*The curriculum, training in good citizenship, the critical vision expressed in and by knowledge* [...] *are being transformed into a commercial process, into products to be sold for a given price*". The criteria for judging the quality of a university become dependant on the cost of studying there and its ability to organize itself according to market logic. "***A university sells well if it has a good campus, sports facilities, serious professors and a pleasant appearance, even if it is totally impossible to check the relevance or the social quality of the value of the knowledge which is produced there***".

In the United States: disparities between institutions and market segmentation

According to Koch (2008) the private sector of higher education has developed greatly in the United States. Neither the regional accreditation agencies, nor State laws have acted against the expansion of these for-profit institutions, a phenomenon which shocks certain academics even though, he recalls, such institutions have existed in the shadow of public education since colonial times. These institutions rely entirely on private funding. Newfield (2007) believes that "*the capital contribution of private universities, encouraged by the generosity of increasingly rich benefactors and by shrewd investment on financial markets*" has increased by 10% to 20% per year over the last 15 years.

Meanwhile, funds allocated to the public education service, attended by 80% of American students, have on average decreased by a third over the last 20 years. To balance their budgets, public corporations have substantially increased their school fees and have recourse to patronage to finance research. Following the example of private institutions, they in their turn have to request private donations from "benefactors": parents, former students, municipalities, inhabitants, private companies, etc. Public universities attempt to reserve these private funds for "potentially profitable" projects. But Newfield thinks that "*for public universities, this spiral is absurd and hopeless*".

In the eyes of the foreign observer, the distinction between public and private universities is not a clear one since both have high registration fees and request private funds. The financial criterion is therefore not necessarily a means of distinguishing between the two. From a practical point of view, it may however be noted that the name of public corporations generally includes the words "*state*" or "*community*". But *American Public Education* is an entrepreneurial university quoted on the stock exchange, specialising in distance learning for soldiers.

The table of American higher education drawn up by Koch (2008) shows a very composite and disparate situation between institutions.
The first disparity relates to the appropriation of State universities: from $10,000 per student for the University of California to $4,400 for *Tidewater community college*. The second affects teacher pay. This can vary by a factor of three depending on the type and reputation of the institution. But more enlightening is the disparity in the endowments collected by the institutions: expressed as a ratio per student, the figures range between $1,951,000 at Yale, scarcely less at Harvard, $195,000 at the University of Michigan, $900 at the State University of Los Angeles and only $150 at the *Tidewater community college*. These figures bring out the phenomenal resources available to major private Ivy League institutions. The bulk of these resources are allotted to scientific research activities, but Koch calculates that if Harvard or Yale devoted only 5% of their endowments to teaching activities, this would still represent an annual budget of $86,000 and $97,300 per student.
In 2007, Newfield had already pointed out some financial let-downs concerning major private universities (Harvard lost 350 million dollars in a speculative fund debacle). It is highly likely that the financial crisis of autumn 2008 will have major repercussions on the resources of American universities, but it is too early to see to what extent. It should however be noted that elite private universities are not regarded as for-profit institutions: they are above all aiming for excellence, and the prestige and the influence which result from this.
These well-endowed institutions have no difficulty in offering luxury educational programmes for a chosen student clientele. Students from well-off families have a head start in the race, but the criteria of academic excellence also come into the reckoning. Rich universities readily offer grants when it is a question of attracting the most brilliant students, in order to collect the best talents.

Teaching gives preference to small classes, properly supervised by a prestigious teaching body, state-of-the-art technological facilities, residential courses abroad, etc. For Newfield (2007), these major private institutions, as well as a handful of major State universities (mainly concentrated in California), are "ghettos of excellence".

The general situation of run-of-the-mill universities is quite different; it is experiencing a "*slow decline* [which] *is happening so discreetly that it does not move world at large. Except for a small elite, privatisation can be summed up in the following equation: pay more to get less".* So many public universities, short on resources, acquire a second or third rate reputation, taking in none but the students from the poorest minorities.

Koch (2008) observes an increasing *multifurcation* of higher education. He makes an analogy between the current academic market and that of catering: there is a profusion of choice, from luxurious haute-cuisine restaurants to fast-food outlets.

There is no doubt that is in the category of institutions offering low value for money that Molnar would classify the universities directed by certain EMOs, better at composing an enticing menu than at taking care with what is in the plate. He attests to doubtful marketing methods, which make students believe that they can "earn" their diploma in one year or less thanks to distance learning. Others, in contrast, lead students to hope that they can obtain results with little work. Molnar (in Boyles, 2005) speaks of universities which are like model companies, dreamed up by programme and curriculum specialists. "*Students are hammered, chiselled, drilled and bolted in the same routinized way until they are ready for 'real world', read* 'market'".

But for Koch, market segmentation is also one of the new trends, which are not specific to the United States.

See also

- VALADE Jacques, DUPONT Ambroise & RENAR Ivan *et al.* (2007). *Regards sur l'enseignement supérieur et l'action culturelle des États-Unis : L'autonomie au service de la diversité*. Paris: Sénat, Commission des affaires culturelles.

Emerging trends

New public, new needs, new markets

Lack of security on the job market, flexible contracts, people being laid off in droves with all sectors of the economy being hit one after the other, and permanent and ever more rapidly changing technologies are all factors which increase the need for "lifelong learning". Universities have understood this and are opening up to this special public of adults in paid employment, jobseekers and/or people in search of new competencies to develop their career or to retrain.

In the course of a lifetime, it has become increasingly current to go through university several times: once for initial training, then at least once again to remain in the race – without even mentioning the University of the Third Age.
Whether it is a question of preparing a state diploma, a university degree or of acquiring more specific competencies (languages, data processing, technical subjects, etc.), universities put forward their reputation to propose training and to accommodate these new publics, who are sometimes enrolled in initial training courses but are more often taken on in a specific educational context, or even one that has been made to measure.

This is clearly worthwhile from the economic standpoint, since the universities are free to fix the rates for in-service education. The ideal context is that where the employer funds the training directly, but more and more adults pay for lifelong learning out of their own pocket. In certain countries such as France, out of work adults can receive a grant or help from the region, but this system has not been put into place on a widespread basis. So personal and family savings, and also loans are pressed into service to fund adult education.
In-service education is a profit-making activity, which often allows universities to balance their budget. Duke university, for example, funds most of its research through income from the training sector.

In the United States, Koch (2008) notices that it is the most recent universities and the least well-endowed that are most in tune with the special needs of these new publics. They make great efforts to satisfy their expectations, whether these concern initial or in-service training. These institutions can therefore be considered as entrepreneurial universities. The case of the University of Phoenix is quoted as prototypical. This institution proposes teaching and services adapted to students who cannot follow a course in usual conditions (students in employment, soldiers, heads of families, people living far away, etc.). Phoenix offers number of facilities: training rooms near shopping centres or business districts, special times, distance learning, technical assistance and professional advisers made available, etc. The teaching body also calls largely upon the competencies of active professionals, teaching part-time. The great flexibility of the Phoenix model seems to be setting a trend.

It is with respect to these publics that the Open Distance Learning (ODL) market is developing, allowing universities to take advantage of federal assistance (Chaptal, 2006). In fact, "**unconventional" publics are currently in the majority in the United States student population**. For Koch, the diversification of the educational offer seems in the end to provide a good answer to the population growth of minorities.

In this same logic of diversified services offered by universities, Koch also notes new support "services" available to students: re-engineering teaching materials, courses recorded in *Ipod* format or on *You Tube*, learning services, tutorials, internships found, personal supervision of student life: services which the author compares to a form of "parental substitution".

❑ Distance learning

• In France

The Formasup public higher education catalogue currently proposes 1,700 distance learning courses in 300 fields. The Cned (French distance learning centre) and the Cnam (French public scientific, cultural and professional institution) are greatly involved in this. Most of these courses are still run using conventional distance learning methods: handouts, CD-ROMS, and audio or video cassettes, even though related services are offered on line. Only 11% of the courses are described as "entirely distance-learning based" (which seems to mean "on line"). On-line courses make up the offer of the 23 French "virtual campuses" and the Cned.

In the early 2000s, the ministry encouraged universities to become involved in virtual campus projects in order to develop distance learning to meet the needs for lifelong education. Candidate universities grouped together into "consortiums" and set up partnerships with private companies and local authorities. Project launching was backed by grants, with the aim that after a few years campuses would be self-funding (Thibault, 2006). While today digital campuses are no longer officially subsidized, "other national operations" seem still to be necessary to supplement their funding. Petit, Thibault & Trebbi (2006) question the presupposition that on-line teaching should necessarily reduce the costs of education. If such were not the case, would the authorities still agree to support it?

Sandrine Garcia (2003) observes that the special rates that distance learning allows are comparable to those applied in in-service training. This information tends to blur the border between initial training and in-service training, since on-line training targets both publics equally. The term "learner" by which candidates for distance learning are designated also abolishes this distinction.

• Worldwide

Denys Lamontagne, the director of the French-speaking site Thot Cursus devoted to current issues about distance learning, is a good observer of this sector. In an article written in 2005, he reckoned that the percentage of the population who, during the course of the year, had followed a distance learning course was 0.9% in Algeria, 1.3% in Spain, 2% in France and 2.6% in Quebec, or double the figures of ten years previously. This can largely be put down to the offer available via the Internet. But studies show that the marketing of distance learning is moving primarily towards educated populations. Lamontagne notes that "*only a social or administrative decision will make distance learning available for the first level* [5 years after A-levels] [...], *the potential customers being neither easy to recruit nor very lucrative*". He concludes: "*if we want to see distance learning becoming popular with people who have been educated and with others it will have to be marketed, since the reality of the market is apparently the main force which controls it, even if we don't like the idea. Most educational institutions have never included distance learning as anything other than a palliative solution. So it has never been subjected to the same funding approach and it is for the time being that of the market which prevails over its development*".

A publication by the Quebec department of industry and trade (2004) described the virtual education industry as *"a young, emerging industry which offers new perspectives for training*" but also as *"a market in full swing throughout the world*" because *"the very horizontal nature of virtual education gives it the ability to penetrate a multitude of economic sectors, while being initially a technological tool*". It is true that Quebec has long been working on research into educational software and distance learning. The authorities are developing an "industrial profile" designed to help companies through funding and marketing stages of their offers. The document quotes fluctuating estimates as to the scale of the worldwide distance learning market: in 2002, 6.6 billion dollars according to IDC; in 2005, 27 billion, according to Giga and 33.6 billion according to Gartner. Giga also estimates that **the institutional educational sector (from primary school to higher education) could provide a bigger market than that of companies** (professional and in-service training), at international level. As regards tools and learning platforms, the market was reckoned to be worth 235 billion dollars in 2002 and projections were based on an annual growth of 37%.

At the dawn of the second millennium, the development of networks and the Internet inspired prospects of a total "revolution" in education on a worldwide scale. But it seems that this "bubble" of the new economy has become somewhat deflated as it came up against sociological and cultural realities. Experience feedback testifies to the difficulty of using complex and expensive technology to modify teaching methods. "*No-one any longer defends the* ex nihilo *creation of remote universities which would indifferently impact an international public as vast as it is badly defined. The idea of a large worldwide education market, at least for the time being, is a failure. The disappearance of the WEM* [World education market], *after only a few attempts, is proof of this*" (Petit, Thibault & Trebbi, 2006).

Looking at the development of e-learning in the United States, Alain Chaptal (2006) confirms that the "teaching revolution" announced in the 1990s has not (yet?) kept its promises. But he does observe some interesting developments. "*Faced with the production-based objectives of industrialisation*", he sees "*trends towards sharing, based on social relationships of exchange between producers and users*" at work.

❑ Company "universities" a misleading name

Christian Laval (2006) notes the current growth of "company universities", related to multinationals, which are thought to number a thousand or so throughout the world. Mention may be made, for example, of the *Mac Donald*

Hamburger university and the Areva University. Consulting the Web sites of these structures, it quickly becomes apparent that this self-styled "university" covers nothing more than an in-house training department, albeit a large one. The role of these centres is to provide professional technical training for company staff, but also "*to develop the feeling of belonging and get people to share group values and culture*", "*to encourage implementation of the strategy and involve them in all major group issues*", "*to develop managers' talents and competencies, and prepare the leaders of tomorrow*", "*to assist with change, promote continuous progress and innovation, and contribute to improved performance*" (Areva site). While these institutions give themselves a certain university veneer by offering well-paid teaching posts to university professors, they do not have any real research activity.
On this subject, the Microsoft.net university adopts a different strategy, since it is addressed to pre-selected outside developers, whose competencies the company proposes to increase by approved and certified distance learning courses. Trained in this way, these developers are taken on by Microsoft or one of its partners, who pay for the cost of their training. But here too, the term "university" seems an inaccurate one for an internal training course. The usurpation of the word "university" contributes to blurring the borders between higher education and adapting to one's job position, between the acquisition of knowledge and know-how, and technical or behavioural conditioning (Laval, 2006).

By observing developments from the standpoint of privatisation, this section has brought out a fairly contrasted situation depending on the level of education. In secondary education, the onward march of the private sector remains limited and is operative mainly in areas where public education is lacking. But private schools depend greatly on public finances, by which means States show their determination to keep control. The liberalisation of the education market that the partisans of free choice of school are aiming for could not, in our opinion, take the form of a deregulation of secondary education. It seems, on the contrary, that politicians put up with the existence of a private sector that is restricted and under control, as a minor concession made to marginal groups and as a means of challenging the opponents to do better than public education, in the very area where it has the most difficulty in getting its pupils to succeed.

In higher education, on the other hand, privatisation is part of a very different approach. First of all, the private sector develops within a much less controlled framework and answers needs that public education is not always able to cover: mass access to higher education, and diversification of publics, by means of in-service training and lifelong learning. So the profile of the higher-education user – if not the customer – is tending to move away from the traditional prototype of the young post A-level student. In addition, it is within public universities that new relations with the private sector are being established, more and more called on to take part in the funding of institutions, but also to become a "partner" of university projects.

In this section, internationalisation has appeared once more as a central issue. In the next section we will therefore look at the market from the standpoint of the issues of internationalisation.

Internationalisation of markets and the race to be top of the league table

While research activities have always been part of international exchange relations, which only conflicts between States can slow down, this has been less true of teaching activities (Musselin, 2008). Twenty years ago, "trans-national" teaching was still above all a feature of political, geostrategic and cultural ambitions, together with those aimed towards development aid. But the situation has gradually changed over the ten last years, higher education becoming increasingly involved in the universalisation of economic exchanges. Today, higher education as part of an international dimension is both "*an economic lever for countries*" and "*a competitive advantage for educational institutions*" (Vincent-Lancrin, 2008). The issues of internationalisation have thus gone beyond the framework of educational policies to become part of an economic strategy.

In terms of opening up to the international market, strategies pointing in five simultaneous directions are to be observed in the world:
- taking foreign students into national campuses;
- recruiting foreign teachers;
- organising study programmes dispensed on an off-shore basis in foreign countries;
- setting up (or acquiring) institutions abroad funded by national capital;
- funds collected from foreign companies, involved as patrons or partners of R & D projects.

So students, teachers, training programmes, campuses and even funding find themselves at the centre of an international approach to the market, developed by higher education institutions and the most enterprising universities.

The student market: quantity for some; quality for others

For about twenty years, foreign students entering higher education institutions have provided an increasing outlet for certain Western countries, which therefore compete to attract this public. In 2005, there were 2.7 million people in the world studying in a foreign country, including 85% in the OECD zone, where numbers are growing at a rate of 10% per year. Two thirds of the students come from a country outside the OECD, which shows a clear trend towards a south-north flow. Within the OECD, five countries attract more than half the students: 22% go to the United States, 12% to the United Kingdom, 10% to Germany, 9% to France and 6% to Australia. But if these figures are expressed as a percentage of the number of students of each country, the situation is quite different: 60% of students in Macao are foreign, 28% in New Zealand, 16% in Australia and in the United Kingdom, 11% in France and only 3.5% in the United States. Student mobility represents an annual value of more than 30 billion euros for the OECD, foreign student enrolment being put down as "income from export" (Vincent-Lancrin, 2008).

Concerning Australia, Nicolas Gachon (2007) speaks about an "aggressive" strategy deployed by the universities to "canvass" for foreign, mainly Asian customers. In 2000, there were over 95,000 foreign students, this number having more than tripled in ten years. *"Australia is one of the most proactive countries today as regards marketing its higher education*", a market which represents the country's third source of services exported. And the Australian government hopes to quadruple the number of foreign students. Martens & Starke (2008) give an account of a similar situation in New Zealand.

The special case of Macao, Singapore and Malaysia, which have a large population of foreign students, is explained by Annie Vinokur (2008) by a hub strategy which makes it possible to attract the students of a large area towards a concentrated training offer, brought in by foreign service-providers. English then often becomes the teaching language.

For Marginson (2008), the relatively low number of foreign students studying in the United States marks a deliberate choice in favour of quality rather than quantity. "*Unlike most English, Australian or New Zealand universities, American universities that have PhD programme do not seek to attract the greatest possible number foreign students. What they want is to have the best. They do not manage their international programmes from the standpoint of maximum income but subsidise foreign students by grants and assistants' posts. The United States is the Phd department of the planet*".

The teacher market: towards a concentration of talents

Academics in higher education are more and more recruited on an international scale. The richest universities can afford to make generous offers to attract the most brilliant personalities in their speciality, whatever their country of origin. This trend can be seen in particular in the scientific disciplines, commerce and management. The selection criteria taken into account are primarily related to the research activity and not to the candidates' teaching skills. For the latter, in addition to the pay, other criteria may prove to be decisive, relating the prestige of the university and the conditions of research provided (state-of-the-art facilities, etc). This leads to perverse effects such as the "brain drain" towards the richest countries and, even within these countries, a concentration of the best research abilities in the richest universities (Marginson, 2008).

On a different note, Vinokur (2008) points out the case of certain countries such as the Philippines and Jamaica, whose higher education has specialised in the qualification of staff able to meet the demand of OECD countries. Teachers, just like doctors, do work which comes under this deliberate strategy of "exporting brainpower".

The education market: remotely or off-shore

In parallel with student mobility, Vincent-Lancrin (2008) observes that teaching and training programmes are tending towards mobility, implemented by universities in anticipation of foreign publics. These internationalised programmes generally combine distance learning and *off-shore* education.

Off-shore courses allow foreign students to follow the courses of an institution with a high reputation in their own country, on the campus of a local institution. Some of these programmes are part of not-for-profit partnerships, but most have a commercial aim, especially in the Asia-Pacific area.

Vincent-Lancrin distinguishes two forms of organisation: franchises and twinnings. For franchises, the initiating institution authorizes the local institution to dispense the teaching programme itself in accordance with given contractual conditions. For twinning, the students follow part of the course in the local institution and then complete it in the foreign institution. The two countries with the most involvement in these systems are the United Kingdom and Australia. The latter proposed 1,600 programmes abroad in 2003.

Vinokur (2008) observes that joint ventures and subsidiaries are frequently used on a temporary basis by host countries, such as China, Russia or the countries of the Gulf, to build or rebuild their own higher education system and to establish their own regional intake area.

The institution market: university "chains"?

In the previous section, Didricksson (in AFIRSE, 2006) had drawn attention to the phenomenon of setting up and buying out local institutions by powerful foreign firms, in Latin America. For Vincent-Lancrin (2008), this is the ultimate form of internationalisation of teaching, involving **competing with local universities on their own ground**. In 2005, there were a hundred campuses of this type, mainly in Asia. Total or partial acquisitions of local universities also come under the policy of internationalisation. For example, the American group *Laureate international*, which to date has 42 institutions to its credit, in Central America, Asia, South Africa and Europe, boasts that it **educates 500,000 students throughout the world.**

It may be noted that the creation of institutions may reduce off-shore or distance learning courses which had previously been in existence in the same area decrease, or make them disappear. More generally, it appears that internationalisation strategies are relatively opportunist and therefore likely to frequently change direction, according to changes in the economic situations and local demand.

The funding market: foreign funds to be raised

Collecting foreign funds is the final aspect of the internationalisation of markets for educational institutions. Recourse to patronage, sponsoring and partnerships with private companies have already been mentioned in the previous pages. Let us simply add that, here too, the image, the prestige and the reputation of the university prove to be key factors to attract foreign backers. This brings us to consider the question of the impact that the international league tables are having on the development strategies of higher education throughout the world.

International league tables and their impact

Over the last few years, the growing number of league tables and other international awards that have been widely publicised via the Internet have contributed to the development of competition between universities, which is also competition between countries.

For the record, the first Shanghai ranking was set up in 2003 by a chemist, at the request of the president of Jiao-Tong university, answering the request of the Chinese government to send some brilliant students to the best foreign universities. In the absence of other information, the researcher based his work on the "objective" data he was able to collect: the number of Nobel Prizes, Field medals, publications in the most prestigious reviews, etc. The result of this is a **league table based primarily on research criteria**, in which English-speaking universities dominate overwhelmingly and European higher education is relegated to a subordinate position. Although highly criticised, the Shanghai ranking does at least exist, with its advantages and disadvantages, not least among which is that it is widely publicised. Each year, the new results "*drop on French research with all the delicacy of a meat-cleaver*", summarises Viviane Thivent on the Cité des sciences site.

Whatever the accuracy of the criticisms brought to bear against the league tables, the safest foil seems to be to counter-attack. So "*Odile Quintin, Director General for education at the European commission, announced on Thursday, November 13* [2008] *in Paris, during a European conference devoted to the "international comparison of education systems", the launch of an invitation to tender for a* [university] *league table 'which should be available in 2010'*" (*Le Monde*, 11/15/08).

Other league tables by branch are also regularly published by large press agencies. Sometimes it is the courses and the degrees which are rated; sometimes the institutions themselves. Beside academic criteria, criteria related to the conveniences of student life appear more and more. Like in a tourist guide, educational and sports facilities, the features of the campus and buildings, housing and catering, etc., each get a mark which contributes to making an institution more or less attractive for students. These league tables spur universities on to divide their investments up between the aims of educational quality and pleasant living conditions for students. So league tables and awards, which are accessible to all on the Internet, become references that cannot be ignored, and influencing the choices and strategies made by all parties.

In France, authorities are showing clear determination to make higher education easier to understand and more attractive for foreigners. This initially involves the movement for geostrategic grouping of institutions as part of the nine French "research and higher education centres"(PRES) created in 2007. It also involves the very recent "Campus operation" aiming, as the ministry puts it, "*to reveal 10 campuses of excellence which will be a shop window for France and will make French universities more attractive and more influential*", backed by 5 billion euros, mainly invested in building restoration. One can also note, as does Vinokur (2008), that the higher education "annual performance project" – a document which lays down the objectives in terms of results, as part of the Lolf (the incorporating act on financial laws) – has since 2007 included objective 5 which aims at "*making the French education offer more attractive internationally*". The number of foreign students and their success rate as compared with that of French students are the indicators selected to evaluate this objective.

For Annie Vinokur (2008), international league tables highlight a "dualisation" of higher education. "*On the one hand universities of 'excellence' where the quality of research guarantees that of the education of internationally mobile elites; on the other mass teaching, intended for jobs that do not attract international competition, which could just as well be entrusted to second-rate institutions or transnational suppliers. For most educational arenas, being included in international academic competition currently implies (i) extraverting the education of elites and research ('international' degrees ,lectures in English, publication in English-speaking journals, etc); (ii) adopting* [...] *imported quality assurance systems and accreditation"*.

❑ See also

- Bourdin Joël (2008). *Enseignement supérieur : le défi des classements*. Paris: Sénat.

The accreditation market: at the service of quality… and competition?

The VST recently devoted an issue to Assessment: a central issue for learning (Endrizzi & Rey, 2008), which brings out the diversity of the fields that are assessed today in the educational context. The register which interests us here is that of assessment leading to accreditation which tends to have an impact on the quality of courses and educational institutions, by measuring the results which they produce.

Vinokur (2008) distinguishes two mechanisms which underlie two philosophies of accreditation:

– internalised, or "*bottom-up*" accreditation, corresponds to the "credit" system (ECTS) valid throughout Europe. Qualification of these credits is entrusted to a panel of European universities, as part of the Tuning project, which develops *"benchmarks expressed in terms of learning and competency acquisition"*, on the assumption that *"the language of competencies can be useful to express comparability in terms of graduate performance;*

– externalised, or top-down accreditation, is sub-contracted to independent testing organisations. This accreditation aims both to homogenise competencies on the job market and measure the efficiency of the service providers.

The case of *Masters of business administration* (MBAs) may provide a prototypical example of the issues of accreditation. In this area, three organisations have brought their weight to bear and reign over the international market: The AMBA (*Association of MBAs*) in the United Kingdom, the AACSB (*Association to advance collegiate schools of business*) in the United States and the EQUIS (*European quality improvement system*) in Brussels. Each issues its own certification, which applies either to the learning programmes, or to the institutions which prepare them. The assessment protocol which leads to the granting - or failure to grant - accreditation costs between €22,000 and €26,000, and its annual renewal approximately 3,000 euros. As the three organisations each exert comparable authority on the market, any self-respecting institution is more or less obliged to obtain the three certifications for its main programmes. These certifications provide an open-sesame which allow business schools to acquire international recognition and reach candidates (both students and teachers) in the respective zones in which the accreditation body has influence (these observations are from Rémy Paliard, a finance lecturer at the EM Lyon business school).

Internationalisation: a vector of cultural hegemony?

As a conclusion of sorts to all of the observations which we have put together on higher education, the analyses of the Australian researcher Simon Marginson (2008) may offer an interesting perspective.
Marginson wonders about the special position that higher education in the USA occupies with respect to the rest of the world. He first proposes a synoptic view of American university, which is distributed between two centres, or "templates":

– on one side, the **Harvard prototype**: *"the private, not-for-profit, elite university, centred on research and doctoral training , competitive, impregnated with the spirit of enterprise, severely selecting its students, demanding very high fees but offering generous assistance, benefiting from large donations, and competing fiercely to obtain the best students and the best academics";*

– on the other, the **Phoenix prototype**: "*a for-profit higher education institution, which prepares its students for professional life in subjects such as management, technologies, healthcare professions and teaching. They are business enterprises, centred on the "consumer", expansionist, efficient, economical (no research is carried out there), practising in terms of human resources performance management and quality assurance*";

– between the two, increasingly devalued and marginalised universities.

We should note in passing that this model tallies fairly well with the analyses suggested by Koch, Newfield and Vinokur.

Marginson then observes that the "export" activity of American universities, as important is it is (9.1 billion dollars in 2001), could well be more "*if its only objective were mercantile*". Another interest seems therefore to be supplanting the economic interest. Based on the definition of the concept of "**cultural hegemony**" developed by Gramsci, the author defends the thesis that such is indeed this prime interest *"This is* ***a much more important stake than the trade balance or the enrichment of universities***", he believes.

This hegemony finds its conditions instrumental in the huge dimensions of the region, in the economic power of the American nation, and also in the undeniable linguistic advantage that the English language provides it with. The latter is already the world language of science: to publish in English is an essential condition for a piece of research to have some chance becoming part of the intellectual exchanges which take place around the globe. "*It is not only that English is preferred to other languages, but also that greater* intrinsic *value is attached to knowledge published in English*". English is also asserting itself more and more as the language of higher education. In addition to the convenience of a common language between teachers and students of different nationalities, **English is now accepted as a pledge of seriousness and *enhances the knowledge* dispensed in this language**. This is how *"a single culture climate*" is becoming established *in* and *by* universities.

The researcher then shows how the strong involvement of the United States in drawing up quality standards helps to impose the double Harvard/Phoenix mode on all nations, i.e. also tending to marginalise universities which do not fit into this model.

Marginson then summarizes what he calls the "**global university hegemony**" as a two-way play of forces exerted from the centre (the United States) outwards (the rest of the world, the distance from each country in relation to the centre being measured in terms of greater or lesser closeness to the American cultural model):

– a ***magnetising* force**, sufficiently powerful to capture and appropriate the best resources, whether these be financial or human, which are then integrated into the American elite university. Round the edge, the attraction effect is still very powerful but this time acts not to capture but to seduce. The American Harvard/Phoenix university model makes its presence felt as *the* reference and puts the institutions of all countries in competition to approach the central magnet;

– a ***repelling* force**, which marginalises universities which do not conform to the model, which is the case in Europe and Latin America, making them doomed to insignificance. The only way of getting out of this marginality is to get back into the field of the attraction force. This is what the authorities of the nations concerned have understood, including France, when they try to dig out of the pile a selection of high-potential institutes and universities, which will be helped to assert and confirm their excellence to get back into the worldwide game.

This hegemonic process is all the more effective as it keeps being consolidated and reinforced simply by existing. Cultural hegemony proves to be a much more powerful asset than economic and political domination (even if the former can only support the latter) in the sense that it is guaranteed *perenniality* by the fact that it takes place through the system of transmission of knowledge to future generations: teaching. ***"Every relationship of 'hegemony' is necessarily an educational relationship",*** as Gramsci already pointed out (quoted by Marginson, 2008).

See also

- (2006). "De la formation à l'emploi : des politiques à l'épreuve de la qualité". *Éducation et sociétés*, n° 18.
- NORMAND Romuald (2006). "L'université gouvernée par les normes". In Lamarche T. (dir). *Capitalisme et éducation*. Paris : Éditions Syllepse, p. 97-107.
- REY Olivier (2007). University "small worlds" in Globalisation. *Dossier d'actualité de la VST*, n° 29, september.

Conclusion

Observing his fellow-citizens, François Dubet (2007) asked about this very French sport which involves refusing any idea of market in the field of education, to the point of denying its very existence. He demonstrates that this French "hypocrisy" is not only vain but counter-productive. "***Denying the market prohibits any equitable regulation*** *under the pretext that education is not goods and that it could not have a price. In the long term, one can even observe a kind of* ***upside-down social redistribution in which the fact that studies are free masks****, especially in higher education,* ***the fact that less is spent on the least privileged and more on the most privileged***".

No doubt this attitude reflects our tendency to polarise the debate with over-simplified oppositions: public versus private, too easily transcribed as public property versus goods, or republican values versus mercantile interest. Once the questions have been posed in these terms, explicit or implicit, rejection of the market seems to be taken for granted. Admittedly, things are neither so simple, nor so simplistic, but certain prejudices die hard.

As we leave our exploration, we are obliged to note that the observations gathered fit rather badly into this binary model. The development of the private sector does not appear clearly as the opposite of the public sector of education, even if this may occasionally be the case here and there. Quite the reverse, relations of mutual emulation are rather to be noted - successful or not - in the links which form between public and private sectors. Here, the private sector fulfils a role which the public sector cannot (wider access to higher education, in Eastern Europe for example). Elsewhere, the private sector is challenged by the public institution to do better than the institution itself, rather than criticizing what this public institution does, especially where the public school has a hard time providing solutions to the most difficult problems: educational failure, education in underprivileged environments (*contract schools* in the United States and in Great Britain). The private sector can still act as a safety valve, contributing to alleviating tensions with respect to minority groups for which the State concedes the creation of some "alternative" schools (charter schools in North America). Elsewhere, the private sector reinforces public education by providing it with more resources in order to develop (patronage and partnerships, in higher education).

Neither is the search for economic gain a specific feature of the private sector, since it appears in public education (university in-service training, R & D contracts). But this does not necessarily mean there is a mercantile objective: profit-making activities may support those which are not so.

The international reconfiguration of higher education in the market age seems little by little rather to blur the border between public and private sectors. And for "liberalisation" not to mean "commodification", the role of the States is going more and more down the road of regulation by quality of results. One may of course observe that the methods of the "new public management" are highly impregnated with the managerial techniques of private companies. But after all, wondering about the quality of the results of one's action and trying to improve it are a fairly healthy subject of concern.

It seems that the real debate must deal with the *relevance of the criteria* used to evaluate the results of teaching, with the *validity of the quality standards* which are set up as models, and with the means decreed as being efficient for complying with it. In other words, it is a question of wondering whether this "prescribed quality" really corresponds to the idea that the community may have of successful education.

Further, one may wonder what a model of education quality defined at international level implies for each one of us. What are the real needs met by the current determination to globalise the profile of the competencies which all young people of the planet should acquire?

More than the commodification of education, we believe that ultimately the most worrying risk lies in the **cultural standardisation** that the globalisation of teaching brings about, under the influence of the American model. The normative canons of this globalisation are defined in supranational organisations, and they spread from the top downwards, in particular through higher education and research.

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