

# Time to Turn the Tide

## Privatisation Trends in Education in the Caribbean



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& Dr Rinnelle Lee-Piggott  
February 2022



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Cover picture: Children in the school yard, Jamaica. Jake Brewer, 2006 / Flickr



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## Foreword

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This report shows that as unionists and activists, we cannot be complacent when it comes to protecting public systems. Privatisation trends are not always overt. In fact, privatisation trends are sometimes hidden and may not necessarily be easily identifiable, even by key stakeholders such as policymakers, teachers, students and parents.

Privatisation manifests in multiple forms. Exogenous forms of privatisation of education – such as direct interventions into educational services from private actors and the expansion of for-profit private schools – are perhaps most clearly visible. However, endogenous forms of privatisation, where public sector actors adopt the methods, goals, language and dispositions of the private sector, can be subtle but insidious.

The findings of this exploratory study show that privatisation trends in education in the Caribbean are currently under-researched, yet there are causes for concern. The situation in each of the ten Caribbean countries analysed in this report varies, yet in each country we see some reason for taking a closer look. Some countries' education policies welcome exogenous privatisation explicitly, whilst others show support for privatising features in public systems, or present narrow, economically focused conceptions of education's purpose.

The research finds that favourable conditions for further privatisation exist across the region. A principal issue that must be highlighted is the underfunding of public systems. Only four out of the ten countries meet the Education 2030 target of investing at least 15% of the total government expenditure on education and no countries reach the suggested higher target of 20%. Without adequate education financing, it is not possible to have quality teachers, tools or learning environments, which together enable quality education. Especially in the context of the coronavirus pandemic, it is crucial that governments invest in education for a just recovery.

This research also finds that privatisation in education has been conflated with modernisation, making resistance seem retrograde. This makes our task as unions even more challenging, but not impossible. We must raise our voices to defend public education from attack and build a clear positive narrative on the benefits of public education and the importance of education as a public good. Strong public education systems are by no means a step backwards. On the contrary, they are the essence of



progression – well-funded public education systems are the only way to ensure equity and inclusion and guarantee the right to education for all.

Globally, unions are facing a common threat. Privatisation pathways are context-specific and diverse, but the encroachment of the private sector in public education is felt by all. This research forms part of Education International's Global Response campaign against the privatisation and commercialisation of education. I am grateful to the Canadian Teachers' Federation (CTF/FCE) for supporting the campaign by funding the project. Thank you for showing this solidarity. United, as a global union movement, we will continue to fight against privatisation's negative impact on quality, equitable and inclusive education and labour rights.

David Edwards,

General Secretary,  
Education International

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# Executive summary

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## Introduction and context

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Education privatisation across the Caribbean is under-researched, with very few studies that address it directly. We consequently set out to investigate the extent and impact of privatisation features across the region, as well as the role of public policy in relation to privatisation trends and that of supra-national organisations such as the Caribbean Community (CARICOM), the International Monetary Fund (IMF) and the Global Partnership for Education (GPE).

We are operationalising ‘privatisation’ in this study in three ways. First, we consider exogenous privatisation, or the direct intervention into educational services and provision of private-sector actors. Second, we consider endogenous privatisation, where public-sector actors adopt the methods, goals, language, and dispositions of the private sector. Third, we consider the privatisation of the state itself and its policymaking functions and apparatus.

## Methodology and methods

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Our multiple-methods case study consists of three strands: the first is a documentary analysis that explores privatisation trends in ten nations. These are Antigua and Barbuda; Barbados; Belize; Grenada; Guyana; Jamaica; St. Kitts and Nevis; Saint Lucia; Saint Vincent and the Grenadines; and Trinidad and Tobago. Here, we drew on a range of primary and secondary sources to reveal through discourse analysis the respective state’s attitude(s) towards privatisation, as well as any tensions evident through the documents. We mainly used strategy documents, but also speeches, education acts and a range of secondary sources. We analysed these using discourse analysis. The second strand was a questionnaire survey with three groups of participants: parents (n=64), teachers (n=11) and school leaders, i.e., principals (n=21). Respondents were from Jamaica; Trinidad and Tobago; Guyana; Barbados; and Saint Lucia. We adapted the questionnaire from Winchip et al.’s (2019) instrument. This questionnaire generated mostly Likert-scale and free-text responses. The third strand comprised interviews with seven people from the following participant groups across five countries: a) CARICOM representative, b)

teacher, c) school leader, d) teacher union representative. We analysed these data using thematic analysis.

## **Case-study documentary analyses:**

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Antigua and Barbuda has a philosophy of education and its purposes which is holistic, and which does not privilege a narrow, economically oriented conception of education. However, there is discursive pressure building around the need for increased competitiveness and entrepreneurialism, which places at risk this wide-ranging understanding of what education is for.

Barbados has a much narrower, growth-oriented statement of educational purposes at the heart of its strategy. It consequently has a more explicit focus on privatisation as a mechanism to develop its 'human resources'. The state sees a role for the private sector in co-constructing the curriculum to introduce entrepreneurship and competitiveness. The context is budgetary; Barbados has received support from the IMF that commits the state to neoliberal restructuring.

Belize is relatively economically disadvantaged and is greatly influenced by organised religion. A Kansas-based Catholic mission has established a company there that combines spiritual with commercial objectives, and which the state can only partially resist.

Grenada sets out in its 'Vision 2035' strategy document a conceptualisation of education and its purposes that is strongly adherent to privatising discourses. It exemplifies well the colonisation of the state policy machinery by private-sector interests, aims and language.

Guyana has been very economically disadvantaged but is expecting alleviation through newly found gas reserves. Its strategy for education constructs its societal problems as economic and a corporatised education system as responsible for solving them, through an enhanced accountability structure and financial aid.

Jamaica positions its education system as unaffordable and proposes a range of private-sector-dependent means to address this. It constructs the purposes of education as instrumental; education is intended to create a globally competitive high-quality workforce.

St. Kitts and Nevis is precariously balanced; on one hand, it positions its education system and provision as a key challenge yet on the other hand, it proposes solutions that do follow the more extreme measures and approach of, for instance, Jamaica and Barbados. However, the state uses strongly corporatised language in its policy texts.

Saint Lucia is similarly balanced, with an education strategy that reveals a reasonably holistic conception of education, but which is framed through the Minister's and Permanent Secretary's forewords through an economic-growth lens. The policy pressure clearly exists; as in other states, capital project funding is an area of vulnerability.

St. Vincent and the Grenadines identifies wide-ranging roles for the private sector in its National Economic and Social Development Plan, including as partners in its management. The state apparatus appears greatly colonised by the discourse and methods of privatisation.

Trinidad and Tobago's recent White Paper for education (2017) acknowledges a holistic range of educational goods. However, it is also committed both to increasing exogenous and endogenous privatisation, despite specific proposals lacking in detail.

## Questionnaire

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Parents reported that the following features of privatisation were most evident in their context and experience: school choice; additional fees; private tuition and teachers' lack of professional accreditation. The features impacting most upon them as parents were parent choice, private tuition, teacher qualifications and fees. We suggest that the high position of private tuition reflects the importance of the secondary-school entrance exam in Barbados, where most of the questionnaire respondents are located. The feature impacting most on their child's education was teachers' qualifications. Concerning the reasons behind their own choice of secondary school, parents' reports may be argued to prioritise how their child 'fits into' the school, at the expense of how convenient the school is to attend. This disposition underpins the marketisation of provision.

Teachers ranked the five most-evident features of privatisation as follows:

- 1) teachers may be hired on temporary contracts
- 2) parent choice
- 3) teacher performance management
- 4) teachers may teach outside their specialism
- 5) parents pay fees for essential items

However, for 12 of the 16 measures on the questionnaire, the most common response was 0, indicating 'not evident'. Teachers therefore largely do not experience or perceive significant privatisation in education. On the other hand, in their free-text responses, teachers were

able to describe a range of indicators of privatisation. However, they were not always opposed to these. Some asked for more performance management and others appreciated the galvanising effects of competition.

Leaders ranked the five most-evident features of privatisation as follows:

- 1) parent choice
- 2) teachers may be hired on temporary contracts
- 3) your school is ranked nationally in league tables of school performance
- 4) teachers undergo performance management
- 5) you are responsible for your school's budget

Three features received a score of zero, indicating absence from the survey sites. These were “teachers’ salaries are individually negotiated”, “teachers’ salary scales are determined at the school level” and “teachers’ salaries are linked to their students’ exam scores”. Again, whilst some respondents noted the damaging effect of school marketisation and hence hierarchisation, others were appreciative of the perceived advantages offered by a marketised system. These include more autonomy in decision making and a raised profile for the school.

## Interviews

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Our analysis of our interview data enables us to make three strong claims. First: favourable conditions for education privatisation exist across the region. Despite often articulating positions on education that are oriented more towards the public than the private, interviewees were often unable or perhaps unwilling to identify features of privatisation where they manifested. We identified in the data strong evidence of marketisation and a lack of investment by the state. These costs are passed on to parents, who then perceive public education as deficient. Second, we claim that ubiquitous endogenous privatisation is regarded as education modernisation. We see this in the creation of quasi-markets, working conditions for teachers, including their performance management, and in a generally business-like approach to education, including policy formation and leadership and management. Third, we claim that exogenous privatisation seems provisionally welcomed. Interviewees reported that it was the responsibility of nation states to fund education. However, where this wasn't happening (which is essentially everywhere in our sample), they welcome the intervention of the private sector to fill the gap.

## Mapping privatisation in education in the Caribbean

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Nation states, revealed through policy texts, are variously committed to privatisation as a key mechanism to modernise education provision and improve outcomes. Selection at the end of primary in many Caribbean nations establishes and reinforces the notion of schooling as fundamentally competitive. Whilst opposition is seen in the data, participants in the questionnaire and interview strand are often supportive of privatisation, or key features thereof. It is not always clear to participants that a given phenomenon is an indicator of privatisation; this is more often the case with endogenous forms. Suggestions concerning key actors do not include large, international edu-businesses, implying either that these are operating under the radar, or that the private sector is made up here of heterogeneous actors, with diverse motives. These include religiously motivated companies.

### ***We recommend that policymakers:***

- enact the full breadth of conceptualisations of education that exist in their strategies and laws, rather than privileging the economic;
- fund education to remove additional, often prohibitive costs for parents of their child(ren) attending school. These include the costs of text books and extra-curricular activities;
- create a policy narrative foregrounding education as a public good;
- engage with research demonstrating the limitations of privatisation;
- cease selection to secondary-level schooling;
- tax profits from private-sector involvement in education to fund work towards achieving goals in education-sector plans and/or the achievement of UN Sustainable Development Goal 4 on quality education;
- end the use of temporary teaching contracts where the role is permanent; and
- ensure all teachers are professionally qualified.

### ***We recommend that teacher unions:***

- increase awareness of all forms of education privatisation;
- deploy positive images and political narratives of teachers, education systems and educational leadership that are predicated on education as a public good;

- create and use “public-education champions” in each school to articulate amongst teachers the impact on public-ness of a given policy and to suggest alternatives or amendments; and
- work in partnerships to amplify counter-arguments to privatisation and enhance impact.

***We recommend that future researchers:***

- conduct larger, cross-national surveys in the region;
- explore more fully the ‘who’ of privatisation; and
- investigate through qualitative approaches the embeddedness of dispositions favourable or antagonistic to privatisation in key stakeholder groups.

## **How this report is organised**

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This report is organised in four main sections, beginning with an introduction that serves to situate the focus of this work within the broader context of education privatisation globally. It therefore, rationalises the work and presents our objectives and operational definition(s) of privatisation in and of education. Next, we layout our methodology and methods, which describe a multiple-methods case study design and justify our selection of documentary analysis, questionnaires and interviews for this work. Within this section, we also outline how we gained access to undertake research in the ten Caribbean nations, which formed the focus of this study and set out the ethical implications and integrity of this research. Following, we present our thematised findings according to the three data collection strands, supporting these where evident with existing literature. The report concludes with a mapping of the trends in privatisation in and of education in the Caribbean that have been revealed through this work and enumerates key recommendations for policymakers, teachers’ unions and future research.

**Table 1. Overview of key information points in ten Caribbean nations**

Official/ Main language(s)	Date of independence	Population	GDP per capita \$	Govt spending on education as % of GDP 2020*	GS on ed as % of total govt expenditure 2020*	Years of compulsory education	Number of tertiary institutions	Private school enrolment: (% of total primary/ secondary enrolment)
<b>Antigua and Barbuda</b>								
English/ Antiguan Creole	01/11/1981	97,000	22,460	3.3	8.9	11 (5–15)	3	49/18 (2018)
<b>Barbados</b>								
English/ Bajan	30/11/1966	287,000	16,300	4.3	16.1	11 (5–15)	4	13/7 (2020)
<b>Belize</b>								
English/ Kriol	21/09/1981	390,000	7,166	7.9	21.5	8 (5–12)	3 main & several training institutions	82/68 (2020)**
<b>Grenada</b>								
English/ Grenadian Creole Eng. or French	07/02/1974	112,000	17,760	3.6 (2018)	14 (2017)	12 (5–16)	3	77/63 (2018)
<b>Guyana</b>								
English/ Guyanese Creole	23/02/1970	783,000	13,635	4.5 (2018)	16 (2018)	6 (6–11)	3	7/8 (2012)
<b>Jamaica</b>								
English/ Jamaican Patois	06/08/1962	2,948,000	10,594	5.4	17.3 (2019)	6 (6–11)	3 main & several community colleges	10/2 (2020)
<b>Saint Kitts and Nevis</b>								
English/ St. Kitts Creole	19/09/1983	53,000	27,568	2.6 (2015)	8.6 (2015)	12 (5–16)	1 main with 2 affiliates	23/6 (2016)
<b>Saint Lucia</b>								
English/ St. Lucian Creole French	22/02/1979	183,000	16,102	3.6	14.3	10 (5–14)	2 main & several foreign-based institutions	6/4 (2020)
<b>St. Vincent and the Grenadines</b>								
English/ Vincentian Creole	27/10/1979	111,000	13,013	5.7 (2018)	19 (2018)	12 (5–16)	1 main & several VET institutions	11/28 (2018)
<b>Trinidad and Tobago</b>								
English/ Trinidadian Eng. Creole and Tobagonian Eng. Creole	31/08/1962	1,395,000	28,151	3.6 (2019)	9.4	7 (5–11)	3 main and several community colleges & foreign-based institutions	72/– (2010)

Source for columns 2, 3, 4, 5 and 6 is the UNESCO Institute for Statistics (<http://uis.unesco.org/en/home>)

Source for column 7: UNESCO World Data on Education Country Reports (2010) except row one, for which multiple sources were used and cross-referenced.

Source for column 8: World Bank Data —for primary schooling <https://data.worldbank.org/indicator/SE.PRM.PRIV.ZS> and for secondary schooling <https://data.worldbank.org/indicator/SE.SEC.PRIV.ZS>

\* Unless otherwise stated, in which case the percentage is for the most recently available year.

\*\* This high number is accounted for by only 20% of provision being solely government funded, owned and managed. The largest proportion, c. 60%, is government aided (e.g., denominational schools) and 20% is wholly private. See Schaffer (2020). The World Bank is applying an expansive interpretation of private schooling.

## Introduction and context

This report was commissioned by Education International and funded by the Canadian Teachers' Federation. The aim was to investigate trends in privatisation in education in the Caribbean. Privatisation has been a focus of education research for many years, particularly in western liberal democracies (e.g. Anderson and Donchik, 2016; Ball, 2007; Lingard, 1998; Ozga, 2016; Smyth, 2011; Verger, Fontdevila and Zancajo, 2016), but also increasingly in the Global South, for example in Ghana (Riep, 2014), Liberia (Riep and Machacek, 2020) and India (Srivastava, 2010). This incomplete mapping of the Global South reveals that privatisation is often interplayed with other structural and/or historical features, such as colonialism and poverty, such that power relations enabled or reproduced through the former may intensify experiences or consequences of the latter. In other words, depending on the location and interests of the 'private', privatisation in formerly colonised lands may amount to neo-colonialism (see e.g. Adam, 2019). This is in addition to more widely experienced societal harms caused by privatisation in education, such as the reduction of understandings of education and its goals to the instrumental and economically oriented (Saltman, 2015); the increased deployment of managerialism as a mechanism to achieve it (Gewirtz and Ball, 2000; Hall, 2013); and the purposeful creation of losers in a marketised landscape of provision, amongst schools, their leaders and the pupils who are hierarchically sorted (or who sort themselves) to fit (Courtney, 2015c).

The need to explore privatisation in the Caribbean is therefore pressing and little research has been conducted to date. Croso and Magalhães' (2016) article on education privatisation in Latin America and the Caribbean, for instance, did not report on any Caribbean Island states. However, Jules (2013) traces the development of a regional policy space concerning education, arguing that the failures of socialism in Jamaica, Grenada and Guyana prompted CARICOM to look at market solutions to the problem of skills shortages. The region therefore moved together to embrace entrepreneurialism as a mandatory feature of the ideal Caribbean person, and Human Resource Development as the primary lens for conceptualising education and its outcomes. This has arguably paved the way for Caribbean-wide susceptibility to privatisation in multiple forms.

Our objectives in light of this were to enable deeper understanding of the extent, intensity and impact of privatisation trends in the Caribbean



through mapping trends, key actors and institutional influences. We aimed to investigate the role of public policy in relation to privatisation trends, and also that of supra-national organisations.

In this project, we understand privatisation as more than merely the involvement of the private sector in educational services, design and provision. That is known as exogenous privatisation (Ball, 2007). We have also included *endogenous* forms of privatisation, where educational actors, institutions and/or policy adopts or reproduces the methods, objectives, language, practices or assumptive beliefs of the private sector. It has been referred to as corporatisation (see e.g. Courtney, 2015a). To operationalise this definition of privatisation, we adapted the instrument devised by Winchip et al. (2019) to measure and compare features of privatisation. The full list we used is in Appendix One. It includes exogenous features such as *"the private sector provides professional development for teachers"*, and endogenous features such as *"teachers' salaries are linked to their students' test/exam scores"*. This latter may be viewed as a form of endogenous privatisation because it reduces the complex suite and interplay of practices, identities, agency and structure to a range of inputs and outputs, as in manufacturing, whose relation to one another is unproblematic and linear. Teachers' activities are the key input, yet structural influences such as students' socio-economic background, race and gender are discounted in educational processes, as constructed through, for instance, performance-management relationships. Exam scores are seen as the key educational output, marginalising others such as cultural reproduction and innovation, critical engagement with societal values, and generosity. The United Nations' sustainable development goals for education are more aligned with this holistic conceptualisation of the purposes of education (United Nations Department of Economic and Social Affairs, 2021). Its targets under Goal 4 (education) focus more strongly on equality, sustainability and peace than on the standards agenda. Teaching quality and exam scores dominate thinking and policy in the Global Education Reform Movement (GERM) (see Sahlberg, 2012; Fuller and Stevenson, 2018) because they are measurable and comparable; this underpins the marketisation and privatisation of education. We therefore follow Winchip et al. (2019) in arguing that it is vital to include both endogenous and exogenous forms in our analysis; we argue additionally that insisting that education has broader purposes than simply the economic is an important element of our critical engagement with endogenous privatisation. Our education-policy analysis prompts us to deploy additionally a third form of privatisation; that of the state itself and its policymaking functions and apparatus. We follow Ball (2009) in noting that the infrastructure of the state may be colonised to serve private interests.

# Methodology and methods

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## Research design

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This project is a multiple-methods case study, which consists of three strands: documentary, survey and interview. Each strand has a distinctive sample. The documentary strand explored attitudes towards privatisation by examining a small number of key policies and texts from ten CARICOM countries: Antigua and Barbuda; Barbados; Belize; Grenada; Guyana; Jamaica; St. Kitts and Nevis; Saint Lucia; Saint Vincent and the Grenadines; and Trinidad and Tobago. This strand happened concurrently with the survey strand. Here, three participant groups were invited to share their understanding of the extent and impact of privatisation in their experience through an online questionnaire. These three groups were teachers, school leaders (principals), and parents, all in the public-education system. The phases upon which we focused in this strand comprised early childhood, primary and secondary. All ten nations mentioned above were invited to participate; responses were received from Jamaica, Trinidad and Tobago, Guyana, Barbados, and Saint Lucia. The third strand comprised interviews, and took place following the questionnaire. Here, we interviewed seven people from five countries. The participant groups were a) Regional Body representative, b) teacher, c) school leader, d) teacher union representative. All data were analysed concurrently.

## Recruitment

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In accordance with regional requirements, we asked permission of each national government to undertake empirical research there. This authorisation did not arrive from Antigua and Barbuda; St. Kitts and Nevis; St. Vincent and the Grenadines. In those countries, the documentary strand alone took place. Where authorisation was granted, a list of public schools and their principals was obtained from the minister, or from a public database. For the questionnaire, a sample was created through targeting a number of these principals from each of that nation's districts (unless advised by the Ministry, as in Guyana, to avoid certain districts owing to lack of internet there). The existence of a functional email address was therefore a key selection criterion.

The overall number approached was determined by the overall desired number of 385 returns, shared between the ten countries in a proportion determined by population density. The school leaders were emailed with a request to participate and to forward the invitation to their teachers and those parents for whom email addresses were held. This approach produced fewer responses than anticipated, particularly amongst teachers. Reminders were sent once. Those willing to be interviewed after the survey could supply their contact details; in the event, two interviews were secured in this way. The other interviewees were selected purposively; we made contact with key people at a range of teaching unions, as well as with a regional body, and interviewed those agreeing. We made unsuccessful attempts to recruit interview participants from the following groups: early-childhood teacher and leader; primary-school teacher and leader; education support worker; government minister; lobby-group representative; Organisation of East Caribbean States/ World Bank/ Inter-American Development Bank and Caribbean Development Bank representatives. We can only speculate that the ongoing COVID-19 pandemic had a significant impact on our ability to recruit to this project. Teachers, school leaders and state officials have been primarily concerned with maintaining an educational service through intermittent periods of home learning (United Nations Economic Commission for Latin America and the Caribbean, 2021).

## **Documentary analysis**

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We were particularly interested in the 'official' view of privatisation sanctioned by respective Caribbean states, and so we started by opening each government's website and following links to documents. In this way, we located ministers' speeches and strategy documents. These latter proved so relevant that we subsequently searched for them directly. The documents were analysed by one member of the research team, for consistency, through an approach that drew on critical discourse analysis (Mullet, 2018). Specifically, the unit of analysis was the sentence, and relevant extracts were interrogated for how they reveal, reproduce and disrupt discourses of privatisation through the lexis (including collocations and any jargon) and semantic intent, as well as through significant omissions or silences.

## **Questionnaire**

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Three versions of a questionnaire were created, drawing upon Winchip et al.'s (2019) features of privatisation. The number of items featured in

each questionnaire depended on the number of which someone in that group might reasonably be expected to have knowledge or experience. Therefore, 26 of the 27 items were included in the questionnaire for principals, whereas teachers and parents were asked about 16 and 7 items, respectively (see Appendix One for a full list and participant breakdown). The samples were as follows: **School leaders** (n = 21; males = 8; females = 13), countries represented: Jamaica (2); Trinidad and Tobago (5); Guyana (3); Barbados (8); Saint Lucia (3). **Teachers** (n = 11; males = 1; females = 10), countries represented: Trinidad and Tobago (6); Saint Lucia (1); Barbados (4). **Parents** (n = 64; males = 18; females = 46), countries represented: Trinidad and Tobago (4); Barbados (60). ***The relatively low number of participants means that the present analysis should be seen as exploratory and heuristic, indicating new avenues for future research.*** We had anticipated that emailing 80 school leaders might produce up to 250 responses, once the initial email had been cascaded to parents and teachers. In the event, we emailed 135 school leaders, but this still produced only 96 full, analysable answers (we removed the incomplete data of a further 293 respondents—this implies that the survey burden was experienced as high, particularly during a pandemic).

The questionnaire produced mostly Likert-scale, ordinal data; we therefore analysed this using mode rather than mean averages.

## Interviews

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We conducted semi-structured interviews with a secondary-school leader and teacher from Barbados; Teacher Union representatives from Barbados, Belize, Saint Lucia and Trinidad and Tobago, and a representative from a Regional Body. Interviews took place via Zoom and lasted around 45 minutes to one hour each. Our interview schedule covered the required points, such as which features of privatisation are evident, their impact and who the key actors are. However, we also took advantage of the semi-structured format to follow up emerging lines of enquiry. Data were transcribed using Microsoft 365 software, and tidied/verified manually afterwards. The interview data were analysed thematically, using a hybrid inductive/deductive approach. In other words, we were sensitised from our prior research to common themes, and so identified them here too. However, we were also able to respond more inductively to sub-themes that we detected for the first time in our data, including those arising from several participants' inability or unwillingness to relate their experiences to privatisation.

## **Ethical implications and research integrity**

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The project was scrutinised and authorised separately by the Universities of Manchester and of the West Indies. A key ethical feature is that whilst we will use a pseudonym for all participants, we cannot guarantee that a determined reader will not be able to deduce the identity of representatives of teacher unions and the regional body, owing to their size and reputations. Our consent forms were framed accordingly, and participants recruited on that basis.

## Case-study documentary analyses

### Antigua and Barbuda

Antigua and Barbuda is a nation state comprising two populated eponymous islands, the uninhabited dependency of Redonda and dozens of small islets, all located in the Eastern Caribbean. Antigua is the larger and vastly more populated of the two main islands; this is reflected in the country's political architecture, where Antigua is dominant. Its government's website reports that efforts are being made to address this, with 'a member of the Barbuda Council (which was formed in 1977) now sit[ting] as a member of the Cabinet of Antigua and Barbuda' (Antigua and Barbuda's Government Information and Services, 2021: unpaginated website).

In common with all Caribbean countries, Antigua and Barbuda's history is one of colonisation, here, by the English. Antigua and Barbuda won full independence from the United Kingdom in 1981, and close relationships have since been established first with the United States, which has been 'at the centre of Antigua economic and social life' (Antigua and Barbuda's Government Information and Services, 2021: unpaginated website). More recently, the focus has moved to China; in his 'speech from the throne', the Governor-General of Antigua and Barbuda (Williams, 2021) remarked that 'The People's Republic of China has become our most important development partner, providing grants, expertise and loans' (p. 8). Government expenditure on education per GDP is 2.4% (OECS Statistical Digest, 2013 cited in Ministry of Education Planning Unit, 2015).

UNICEF (2017) reports that Antigua and Barbuda has made good progress in achieving the objectives for basic educational needs that were set out in the United Nations Millennium Development Goals. It has attained 99% literacy, largely through being one of the first Caribbean nations, in 1973, to introduce free, compulsory education. It oversees public and private early childhood education provision, which includes four state-owned centres (Ministry of Education Planning Unit, 2015). It is deemed to have achieved its 'Education for All' objective at primary level, although secondary has proved more challenging, owing at least in part to the relatively high numbers of unqualified teachers - a criterion of interest in this study. The Ministry of Education Planning Unit (2015) reports that in 2014-15, 19.4% of secondary-school teachers in the public sector

were trained with a degree. A further 25% were degree-holders, but without training in education. 26.2% were education trained, but without a degree, and 29.5% were untrained with no degree. There is also a large private sector: in 2014–15, private provision catered for 93.5% of children in the early years phase, 51.6% in the primary and 19% in the secondary phase.

The 2008 Education Act sets out the framework through which education is understood and practised. In this section, we will be highlighting and analysing those elements that are pertinent to issues of privatisation and, relatedly, of what we might call *public-ness*.

First, we note the general educational goals in Section 3.2.b of the Act (Antigua and Barbuda Ministry of Education, 2008, p. 16), which aims at:

*... the promotion of the education of the people of Antigua and Barbuda by the establishment of educational institutions for the purpose of fostering the spiritual, cultural, moral, intellectual, physical, social and economic development of the community.*

This range is broad and places the economic interest last of all. The following section, 3.3.a–k (pp. 16–17), addresses specifically educational goals, and is also notable in its privileging of a holistic construction of the purposes of education. For example, ‘basic knowledge and skills’ (p. 17) are defined indicatively as including literacy, numeracy, and scientific understanding, but also ‘critical and creative thinking skills’ and an ‘appreciation ... of the creative arts’ (p. 16). Other aims include developing self-worth, promoting the family and respect for the Constitution and developing an understanding of gender equality. The economic objective for education is not mentioned explicitly, although the last indicator (k) arguably refers to it implicitly, in aiming ‘to prepare for participation in local, regional and global society’ (p. 17).

Nonetheless, the Act does contain provisions that might facilitate a privatisation agenda, regardless of the intentions of contemporaneous legislators. For example, Sections 57–61 of the Act (2008: 42–45) makes provision for the creation of a Board of Management ‘where it appears to the Minister to do so in the interest of economy, efficiency, and for the participation of the community in the management of education’ (p. 42). The constitution of any such board is purposefully wide, and must include the Principal, a member nominated by the Parent Teacher Association and a staff representative. However, there remain at least four places, which are to be filled by persons representing any of the following domains: educational expertise, religion, community development, teacher unions, or business. Clearly, this would not be a structure where

*business* would dominate, yet it does reveal that the state sees the private sector as a stakeholder in education provision and management. It represents not privatisation *tout fait*, but is a first step towards what Stephen Ball (2008), referring to England's Education Reform Act 1988, called a 'policy ratchet', significant not for what it is, but for what it enables.

*ERA created the possibilities in legal, political and discursive senses for a set of profound and inter-linked changes in the paradigm of English education policy. Specifically ERA and other related legislation made it possible within policy to think about private sector participation in and delivery of state education services. (Ball, 2008: 186)*

In Antigua and Barbuda, this might come about through complacency and neglect rather than strategy. Education is not currently a pressing policy concern. The Governor-General report mentioned above (Williams, 2021) addresses education only on page 20 of a 25-page speech, for 12 lines. Page two (the first substantive page) sets the tone for the government's agenda in the immediate post-pandemic era:

*Further, my Government wishes to assure the new class of creative entrepreneurs, who emerged during Covid-19, that the New Year will be a year of increasing opportunity, of strong economic growth, and with multiple unstoppable pathways to wealth-creation. (Williams, 2021: 2).*

In the education section, the focus is on announcing previous activities which are constituted as successes, comprising employing fifty new teachers 'despite the freeze on hiring announced by my Government' (Williams, 2021: 20); and welcoming the fourth campus of the University of the West Indies to Antigua, 'ensuring easier access to training and new knowledge' (p. 20). We note the syntactical privileging of training over knowledge in this sentence: training is limited and for a specific purpose, unlike the broader implications and meaning of 'education' as defined in the Education Act 2008, which speak to a well-developed sense of 'public-ness'. In the context of the whole speech, it is reasonable to infer that the implicit purpose of the training referred to here may be linked to wealth creation through an instrumentalised curriculum and pedagogies aligned more to training than to critical engagement. No policies concerning the future of education in Antigua and Barbuda are mentioned. Concerning the freeze on hiring, we note that the IMF commissioned research (Mitchell, James, Wickham and Muñoz, 2019) that called for wage constraint across the Eastern Caribbean Currency



Union, i.e. including Antigua and Barbuda. However, that nation does not authorise the publication of the IMF's annual 'health check', so its direct policy recommendations are more opaque.

## Barbados

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Barbados is an island state in the Lesser Antilles, to the east of the other states in that archipelago. It has an area of 169 square miles and a population in 2019 of around 287,000. Barbados gained its independence from the United Kingdom in 1966.

The education system in Barbados is modelled structurally on the English system in operation at independence. This means that provision and shifts therein particular to England are seen also in Barbados. For example, secondary modern schools were created but later became comprehensives, as in many parts of England. Primary and secondary schooling is compulsory and free. Unlike in England, however, all pupils (since 1995) sit the Barbados Secondary School Entrance Examination (BSSEE), which determines subsequent enrolment.

Diverse policy texts depict a nation state at considerable risk of seduction by education privatisation. For instance, the Barbados Government published a handbook in 2000 which provides key contextual and organisational information concerning education (Planning and Research Section, Ministry of Education, Youth Affairs and Culture, Barbados, 2000). It states that:

*The philosophy underlying the Barbados education system is based on the premise that every child should have educational opportunities of a kind which would allow him (sic) to make the most of his abilities and to contribute to the social and economic growth of the country (p. 31).*

This is a much narrower, growth-oriented elucidation of educational purposes than is evident in, for example, Antigua and Barbuda's Education Act 2008. The economic and social are both invoked to support the notion of national growth, which is conceptually distinct from personal or even community growth. Education in Barbados is instrumentalised for these national-level aims and, in the foreword of a 'national consultation on education' (NACE, 2010), its citizens are constructed as the 'human resources' (Rock, in NACE, 2010: 2) that will achieve these ends. Rock sets out the problem clearly: 'The education system is producing too many people lacking the skills for the job market or for effective and efficient living' (in NACE, 2010: 2). This statement reproduces certain foundational

elements of an international discourse of privatisation (see e.g., OECD, 2015), which requires public education to be deficient (thereby necessitating salvation from the private sector) and which establishes solely, or mostly economic purposes for education. The purpose of Rock's statement is to signal a discursive association with such an agenda rather than particularly to make sense: one may reasonably ask, for instance, what 'effective and efficient living' is, and why it might be desirable. The then Governor (Williams, 2004), writing as an economist, eschewed Rock's deficiency framing, preferring to call explicitly for the privatisation of education for its anticipated benefits. He suggests, for instance, that 'it may be necessary to introduce new topics such as entrepreneurship and competitiveness to the syllabus' (2004: 20) to develop the skills deemed necessary and to convert them 'into productive activity' (p. 20). He argued that allowing pupils to choose their subjects is risky, and so choices should be steered towards those most appropriate for nation-building, saying 'there are certain skills which are likely to be necessary in order to ensure the rapid growth of the economy. These often differ from the preferences of individuals ... it is important therefore to create incentives ...' (p. 21). According to him, employers should co-construct the curriculum 'so that the syllabus can be made more relevant to the kind of changes needed' (p. 25). This exemplifies very well neoliberalism, where market forces govern not just economic, but social relations. These forces do not have free rein but are strongly steered at a distance by the state through performance targets, audit and, ultimately, through subjects internalising neoliberal discourse (Ball, 2007) and performing a fabrication, or permanently audit-ready version of the self (Ball, 2000). This is arguably what lies behind calls for citizens to become 'effective and efficient'.

Further documents reveal the impetus for such a framing. The Deputy Governor of the Central Bank of Barbados made clear in a speech that Barbadians 'can no longer expect government to be the sole financier of our education system' (Holder, 2005: 10). It is well established that national economic crises are a key motivator for education privatisation, and, simultaneously, that neoliberal conditions make such crises more likely (Johnson, 2011). As Holder's comment illuminates, Barbados was entering such a period of crisis even before the COVID-19 pandemic. Consequently, its government applied to the International Monetary Fund for emergency support totalling around US\$97.40 million (International Monetary Fund, 2019). This, as always, came with strings attached; Barbados was compelled to restructure its economy with the intention of 'restoring fiscal and debt sustainability, addressing falling reserves, and increasing growth' (IMF, 2019: 53). Education is rarely mentioned explicitly in the IMF report, however, one such mention is in the Supplementary Memorandum of Economic and Financial Policies,

provided by the Barbadian Government. Section 26 (IMF, 2019: 60) states that the Government will become 'an enabler of growth by supporting, facilitating, regulating, and partnering with the traditional and non-traditional private sector'. It is reasonable to infer that one of the ways in which the Government will do this is through Public-Private Partnerships (PPPs), which are often used internationally in the education sector (e.g. Rayner, 2017). In the same IMF report, the Government claims that 'PPPs can play an important role in sustaining growth and increasing potential growth, when done right' (IMF, 2019: 57). The Barbadian Government commits also 'to modernising and improving the efficiency, quality and cost effectiveness of the public sector' (p. 58). So, whilst there is a stated commitment in the policy document to 'investing in a high skilled, and knowledge based economy (sic), particularly in skills training and education more generally' (p. 60), it appears that this investment will involve the private sector, and in return the public sector is to 'modernise' in order to demonstrate endogenously the private-sector virtues of effectiveness and efficiency.

## Belize

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Belize is located on the northern coast of Central America, bordered to the east by the Caribbean Sea, to the north by Mexico and to the west and south by Guatemala. In 2020, it had a population of around 420,000, which, whilst low for the region in terms of density, belies a considerable growth rate. First populated by the Maya, the Spanish then claimed, but failed to settle the territory and it was colonised by the British. Independence was won in 1981.

The education system in Belize is modelled structurally on that of the United Kingdom. There is a large influence from organised religion (though decreasing at secondary level), particularly the U.S. Catholic Church, whose Jesuit churches and missions have historically provided education across Belize. Even where schools are not church run, 'almost all ... are affiliated to a church' (IBE UNESCO, 2006, p. 6). Church schools are funded through public taxation and are deemed public schools, although Schaffer (2020) draws attention to 'a disconnect in the church-state system' (n.p.) which has produced a lack of accountability, non-standardised qualifications and ineffective management.

UNESCO's International Bureau of Education ([www.ibe.unesco.org](http://www.ibe.unesco.org)) provides a 12-part summary of Belize's national goals for education (IBE UNESCO, 2006a), of which only part of the sixth orients education towards economic objectives, which is often foundational to, and a

precursor to privatisation. Objective six requires Belizean students to attain ‘an understanding of the economics of Belize and of the world, the appreciation of work, the capacity to participate in economic activities, skills in design and the ability to use a range of technologies’ (p. 1). This follows other goals concerning, for instance, ‘an appreciation of and respect for different people and cultures and a commitment to justice and equity for all’ and ‘spirituality’ (p. 1). The overarching message that the goals articulate is that education is both for the public good and should develop citizens holistically.

However, it is possible to interpret this less optimistically: ‘only 45 percent of secondary school-aged children attend school, substantially below the regional average of 80 percent’ (Näslund-Hadley, Alonzo and Martin, 2013, p. 4). The number enrolled (net) at secondary school has been declining since 2015/16, from 52.7% to 49.6% in 2018/19 (Belize Ministry of Education, 2019, p. 2). Furthermore, only 65% of secondary-school teachers are trained (Belize Ministry of Education, 2019). Belize’s relatively weak profile concerning educational provision and outcomes will arguably be raised more effectively by its holistic education objectives than by the economically oriented ones used in more developed states.

The case of Belize also raises questions concerning who the private sector is in a given national context, and how that interplays with corporate objectives for education there. In Belize, the Queen of the Holy Rosary Church in Overland Park, Kansas, USA, established first a mission there and then a company, BRC Printing, that ‘by 1995 ... was the largest non-government employer in Benque, where it is headquartered ... By 2007, almost all the 220 or so schools in the country were using BRC’s reading books’ (Dumay, 2019, unpagged). In 2015, BRC Printing brought a judicial review against the Ministry of Education, which had unilaterally reduced the number of books it had ordered from BRC after signing a contract for a higher number. The Ministry ‘had concerns about the content of the reader published by BRC which did not match the official curriculum’ (News5, 2015, unpagged). These concerns did not prevent the state from ordering \$23,000-worth of the books and, presumably, using them in class. The Supreme Court Justice, Michelle Arana, ordered mediation, which resulted in the Ministry agreeing ‘to make up by entering a contract to buy a full order of books for the upcoming school year pending its requested amendments’ (News5, 2015, unpagged). The Ministry also recompensed BRC for a mutually satisfactory, but undisclosed proportion of its losses for the voided contract. In one sense, this is a further instantiation of capital’s intervention into public-school curricula and pedagogies, seen internationally (see e.g. Courtney, 2015a).

## Grenada

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Grenada is a sovereign parliamentary democracy in the southern Lesser Antilles. It consists of the islands of Grenada, Petite Martinique and Carriacou, as well as several further uninhabited isles. To the north lies St. Vincent and the Grenadines and to the south, Trinidad and Tobago. Grenada gained independence from the United Kingdom in 1974.

Grenada has high literacy rates and near-universal access to secondary schooling. It is one of four countries in this sample to be supported by the Global Partnership for Education (GPE), whose stated mission is 'to mobilise partnerships and investments that transform education systems in developing countries, leaving no one behind' (GPE, 2021b: 1). It does this predominantly through providing funding to support eligible countries to achieve their education plans, including sector and COVID-19 response plans. For GPE purposes, Grenada is funded not individually, but as a member of the Organisation of Eastern Caribbean States, along with Saint Lucia, Saint Vincent and the Grenadines (and Dominica). The fourth nation in this sample receiving GPE funding is Guyana. Since joining the partnership in 2016, Grenada has received its share of OECS' \$16,215,387 in funding (GPE, 2021a). According to the GPE, its funding has enabled the development of a framework for the curriculum, standards and assessment across the OECS; supported the professional development of 2,700 teachers, enhanced leadership and accountability and strengthened monitoring and evaluation through a new toolkit (GPE, 2021c). However, to date, no evaluation of GPE's impact across the OECS has taken place of a commensurate level of detail to that undertaken in Guyana (GPE, 2018).

Grenada's National Plan Secretariat (2019) has published a National Sustainable Development Plan 2020–2035 for Grenada (known and referred to hereafter as Vision 2035), which constructs education as a mechanism for a range of objectives and also as an object of reform in itself. The deployment of the word 'vision' is itself positioning, as is the 'transformational leadership' (p. vi) that will apparently be required to achieve it. Both indicate alignment with an international corporatised and managerialist discourse concerning the public sector and its reform (see Courtney and Gunter, 2015). Vision 2035 proposes eight national outcomes, of which the second is to create 'educated, productive, highly-skilled (sic), trained and conscious citizens'. (2019, p. xix). Thirty-nine strategic activities are identified to achieve this, of which the first to specify content rather than a delivery structure requires 'greater emphasis on aligning education and training with the current and future needs of the economy and society' (p. xxiv). Education is consequently

instrumentalised as the means for achieving national economic goals.

Vision 35 also sets out 'national responsibilities' for the range of stakeholders that will be required to contribute to achieving its goals. Those for the public sector use language that speaks to discourses of managerialism and endogenous privatisation (i.e. corporatisation), particularly in the first half. It states that the public sector must be 'fit for the 21st century; solutions-oriented; productive; efficient; formulates and executes policy effectively and transparently; uses national resources prudently; provides quality service to the public; and [is] an exemplar of good governance' (p. xxi). The thinking revealed through this formulation constructs the public sector as requiring the objectives, dispositions and methods of the private, yet does not engage intellectually with the consequences of treating it so. For instance, efficiency is important for profits, but is arguably flawed as an objective for post-pandemic public services, where some slack is required to account for surges in, or disruptions to demand. Publicness fulfils functions that the private sector cannot perform, and requires a distinctive conceptualisation and particular conditions for its nurturing that Vision 35 fails to envisage.

## **Guyana**

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Guyana is the only country in mainland South America where English is an official language. It is located between Suriname to the east, Brazil to the south and south-west and by Venezuela to the west. The Atlantic Ocean borders Guyana's north-eastern coast. Guyana gained independence from the UK in 1966, yet has since 'struggled to overcome poverty and attract investment to bolster its economy' (BBC, 2019, unpagged).

Education is free to the age of 16, compulsory until 15, and structured into nursery, primary and secondary phases. Selection according to ability between primary and secondary was mostly phased out in 2007, but not entirely: the 'top' 27 secondary schools are accessed through high marks in the Grade Six assessment. All other pupils attend their local secondary school. The National Development Strategy Guyana (2000) concluded that 'although Guyana's educational system was considered one of the best in the Caribbean during the 1960s, it is probably the weakest today' (p. 2). Amongst the suggested reasons are the economic crash of the 1970s onwards and emigration. UNESCO's International Bureau of Education (2006b) supported this analysis. However, the discovery of oil and gas reserves in Guyana means that the nation is at a pivotal moment: transformational economic growth is expected but has not yet arrived; this is expected to impact on education. Guyana's national failure to thrive

meant that by 2000, the National Development Strategy was constructing education reform as ‘human resource development’, the state’s ‘highest priority’ (p. 1). The Strategy summarises the key issues at the time as poor learning; unqualified, untrained and often absent teachers; unavailable textbooks; truancy and high dropout rates; and adult functional illiteracy. (National Development Strategy Guyana, 2000, p. 3).

Guyana’s economic situation has since somewhat improved. However, many educational problems remain stubbornly unsolved; for example, less than 50% of teachers in remote regions are trained. A new plan has been generated for education (Guyana Ministry of Education, 2021) in light of the discovery of potentially economically transformative fossil fuels and of the COVID-19 pandemic. Former plans have articulated a distinctive vision for education that emphasise its public benefits. For instance, in its 2008–2013 plan, the Guyana Ministry of Education (2008) defined education

*as more than the instrumental activity for supporting greater national development or reducing poverty, even though it can contribute significantly to both of these objectives. It has intrinsic value. It is the main way to help each human being achieve his/her highest potential. It should be able to give the nation’s citizens the necessary knowledge, skills and values to lead happy and productive lives. On the basis of the education they receive, they should love their country and respect the diversity of their country’s ethnic, religious and political traditions. They should adhere to the ideals and practice of democracy, justice, peace, diversity and accountability. (Guyana Ministry of Education, 2008: 13).*

This is a robust articulation of education as a common good. The 2021 plan, by contrast, eschews philosophy and demonstrates corporatisation. It contains five policy priorities: improving governance and accountability; improving performance at all levels; improving the efficiency of the education system; reducing inequities in education; and contributing to lifelong learning and employability (pp. 3–4). These objectives reproduce and are achieved through New Public Management, where private-sector management dispositions, assumptions and methods are used to ‘deliver’ public services. Privatisation is further embedded within the delivery and evaluation structure at Ministry level, with representatives of the private sector sitting on the Local Education Group, which is to be consulted biannually on progress (see 2021, p. 6). Corporate language suffuses the plan; for instance, the rationale for ensuring nursery-level children learn well notes the ‘research on the returns of investment from quality nursery/early childhood programmes’ (Guyana Ministry of Education,



2021: 79). The overall goal of the plan —‘to contribute employability and reduction of poverty, by increasing performance at all levels and reducing disparity between sub-groups’ (p. 84) — is simultaneously narrow in its conceptualisation of education’s purposes and wide in that of education’s anticipated reach. In other words, Guyana’s diverse societal problems are constructed as economic and a corporatised education system is responsabilised for solving them, supported through a strengthened accountability culture and financial aid from ‘development partners’ unnamed in the document. Nonetheless, we know that one of these partners is GPE, which has provided \$45,768,130 to Guyana in funding since 2002 (GPE, 2021d). A summative evaluation of its interventions carried out by GPE (2018) revealed that it had partially achieved two of its four country-level objectives in Guyana. These two were that GPE contributes ‘to the development of government owned, credible and evidence-based sector plans focused on equity, efficiency and learning’, and ‘to effective and efficient implementation of sector plan(s)’. It found that data did not support two claims, that ‘GPE support for inclusive sector planning and joint monitoring contributes to mutual accountability for education sector progress’, and ‘GPE advocacy and funding requirements contribute to more and better financing for education in Guyana’ (p. 55).

## Jamaica

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Jamaica is the third largest island in the Caribbean after Cuba and Hispaniola. It is situated west of Haiti and south of Cuba, and northeast of Cape Gracias a Dios on the Caribbean coast of Central America (Britannica, n.d.). The population of Jamaica is 2.7 million people, according to the 2014 census conducted by the Statistical Institute of Jamaica (2021).

Primary education is free and compulsory from age five to eleven years (UNESCO, 2019). Education generally begins at the age of three. Legislations relate the governance of education from early years to tertiary (UNESCO-WDE, 2010). The main tertiary institutions indigenous to Jamaica include the University Council of Jamaica, the University of Technology, the University of the West Indies (Mona) and several community colleges. Education is managed by the Ministry of Education and the national Council on Education oversees broad-based participation in education policy development nationally (UNESCO-WDE, 2010).

GDP per capita is PPP\$ 8,442.00 and government expenditure on education as a percentage of GDP is 6.25% (UNESCO, 2021).



The first line of Jamaica's sector plan for education, as part of its Vision 2030 strategy, establishes the state's understanding of the principal purpose for education. The plan states that 'education and training are emerging as key drivers of a country's competitiveness' (Planning Institute of Jamaica, 2009: 3). The vision statement itself is arguably more widely ranging, aiming at a 'well-resourced, internationally recognised, values-based system that develops critical thinking, life-long learners who are productive and successful and can effectively contribute to an improved quality of life at the personal, national and global levels' (2009: 44). Nonetheless, the reported imperative that prompted this vision statement is more instrumentally 'to create a globally competitive high-quality workforce that will meet the needs of an increasingly knowledge-based economy and society' (p. 44).

The document privileges privatisation-based solutions to this 'problem'; the sector plan describes the 'substantial private investment in education', with the Government 'foster[ing] new private and public sector partnerships using deferred financing to create new school places at all levels' (p. 11). The context for the privatising dispositions revealed in such statements is Jamaica's economy, characterised by the World Bank (2020) as 'struggling due to low growth, high public debt, and exposure to external shocks' (unpaged website). It introduced a Fiscal Responsibility Law in 2012 which introduced austerity measures designed to reduce public debt from 100% of GDP in 2018/19 to below 60% by 2025/26 (World Bank, 2020). State spending on education dramatically reduced; Dearden (2013) reported that the percentage of children completing primary school reduced from 97% in 1990 to 73% in 2013. Trines (2019) suggests that this may be attributable to the hidden costs of attending school, including 'for items like uniforms, teaching materials, registration fees, examination fees, and school maintenance fees' (unpaged). Jamaica therefore exemplifies a wider Caribbean discourse which states that publicly funded education is unaffordable. This is operationalised throughout its sector plan for education. For instance, it aims to achieve its goal of 'an adequately managed and financed education system' through 'develop[ing] partnerships with Private Financial Entities for the establishment of Financing products to meet the needs of the education community' (Planning Institute of Jamaica, 2009: 67).

## **St. Kitts and Nevis**

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Saint Kitts and Nevis, also known as Saint Christopher and Nevis, is a twin-island state of the Lesser Antilles within the eastern Caribbean Sea. Saint Kitts and Nevis' form of government is a federated constitutional

monarchy with the British monarch as Head of State. Its official language is English. The population of this Commonwealth nation is around 56,000 people (UNESCO, 2016).

Education is centrally managed by a Ministry of Education (UNESCO-WDE, 2010). Primary and secondary education are free and compulsory from age 5 to 16 years (UNESCO, 2019; UNESCO-WDE, 2010). The Clarence Fitzroy Bryant College is a main provider of tertiary education in Saint Kitts and Nevis, which also has academic crediting arrangements with the University of the West Indies and the University of the Virgin Islands.

GDP per capita is PPP\$ 22,152 (UNESCO, 2021). Government expenditure on education as a percentage of GDP is 2.78% (UNESCO, 2019).

In its Education Sector Plan for 2017–21, St. Kitts and Nevis Ministry of Education (2017) identifies the costs of its public education system as a key challenge, with capital projects often funded through development partnerships. We suggest that this precarity may in future make St. Kitts and Nevis open to seeking aid from the private sector, as we have identified in other Caribbean states (e.g. Jamaica and Barbados). We are reasonably confident in this prediction because of dispositions to privatisation demonstrated elsewhere in the sector plan. For instance, in order to achieve its aim of increasing access and participation to education, the Government envisages ‘subsidising the expansion of the private sector’ (St. Kitts and Nevis MoE, 2017: 34) in the early-years phase. However, current plans regarding privatisation are limited and discrete; it is important to note too which opportunities to privatise are *not* being taken up. For instance, the sector plan commits to creating ‘a fully functional student support services unit in the MoE’: the strong implication is that this will not be tendered to the private sector. These findings concern exogenous privatisation, i.e. the direct involvement in education of the private sector. The picture is different regarding endogenous privatisation, where corporate methods, objectives, goals, values and language are adopted by and for the public sector. The sector plan aims to create ‘an efficient and effective organisational structure ... to support Ministry functions’ (p. 40); governance by numbers—a key managerial feature, see Ozga (2016)—is fully signed up to, with plans for data to inform education planning, policies and resource management. Performance management systems and ‘strong accountability mechanisms’ (p. 41) are seen as appropriate for addressing educational objectives. Education in St. Kitts and Nevis is consequently being strongly corporatised from the ministerial level.

## Saint Lucia

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The small-island state of Saint Lucia is the second largest of the Windward group of islands in the Lesser Antilles within the Caribbean Sea. It is located south of Martinique and northeast of Saint Vincent and has a population of approximately 181,800 people. This Commonwealth nation's official language is English, a legacy of British colonisation. Saint Lucia is a constitutional monarchy with the British monarch as Head of State.

Education is managed primarily by a central ministry as well as denominational boards and schools are located within eight education districts (EFA, 2015; UNESCO-WDE, 2010). Primary education is free and universally accessible, while universal secondary education was achieved in 2006 (UNESCO-WDE, 2010). Education is compulsory from age 5 to 15 years (Education Act of 1999, rev 2005; EFA, 2015). Saint Lucia has a branch of the University of the West Indies; a teachers' college, The Sir Arthur Lewis Community College; and several foreign-based tertiary institutions operating on the island.

GDP per capita is PPP\$ 13,489 (Britannica, n.d.). Government expenditure on education as a percentage of GDP is 5.71% (UNESCO, 2019).

The St Lucia Ministry of Education, Human Resource Development and Labour set out its priorities for education in its sector plan (2015). The then Minister, Robert K. Lewis establishes in his foreword that 'the philosophy which guides [our] significant investments in education is that, in order for us to make the strides necessary to keep our citizens competitive in this global knowledge-based economy, education and training must be the driving force' (2015: 5). The then permanent secretary, Esther Braithwaite, compounds this, writing, 'education IS a basic right for all from birth to adult and it IS OUR responsibility within the Ministry of Education to provide the means by which a child, a student, an adult learner, can contribute meaningfully to the economic development of our country' (p. 7, emphasis in original). A causal relationship between those two clauses is implied through juxtaposition, and other reasons for providing an education de-privileged through omission. The *framing* for the education sector plan is consequently wholly economic, whilst the plan itself is rather more holistic. Its strategic priorities include the democratisation of education, gender equity and human rights, as well as the more corporatised focus on efficiency, effectiveness and accountability. Concerning exogenous privatisation, the plan commits to engaging in strategic partnerships with, inter alia, the private sector,

to enhance its infrastructure and capacity; this reflects findings from other Caribbean states, e.g. St. Kitts and Nevis. Capital project funding is consequently emerging as a key area of vulnerability in the provision of a fully public education system in the region.

## St. Vincent and the Grenadines

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Saint Vincent and the Grenadines (SVG) is an island country, which lies within the Lesser Antilles of the eastern Caribbean Sea. It consists of the mainland island of Saint Vincent and the northern Grenadine Islands, which stretch southward toward Grenada (Britannica, n.d.). A member of the Commonwealth, SVG is a constitutional monarchy with its Head of State remaining the British Monarch though it gained independence in 1979. The English-speaking SVG has a 2020 estimated population of 110,700 people.

The education system of SVG consists of schools which are mainly government-funded or government-assisted, with a small proportion being privately run. Primary education up to age 11 is free. Compulsory education is from age 5 to 16 (UNESCO, 2019). Tertiary education consists of technical vocational institutions and a branch of the Open Campus of the University of the West Indies, the regional university.

GDP per capita is PPP\$10, 909 (Britannica, n.d.). Government expenditure on education is 5.75% of GDP (UNESCO, 2019).

St. Vincent and the Grenadines' National Economic and Social Development Plan 2013–2015 (2013) identifies as an objective *enhancing productivity and competitiveness* (p. 60). None of the strategic interventions or outcomes related to this objective are connected to compulsory schooling. The education sector-specific part of the plan does make this link, however, stating that 'priority will be accorded to the development of requisite skills and competencies for productivity and economic growth' (2013: 101). Indeed, this state goes further than many others in positioning the private sector not just as potential funders of education, particularly its infrastructure, but as partners in its management. This disposition has more in common with England's education-policy landscape (see Courtney, 2015b) than with, for example, Antigua and Barbuda's.

St. Vincent and the Grenadines is part of the Organisation of Eastern Caribbean States, which has published its own education strategy document (OECS, 2012). This commits the nation to 'creating opportunities for the greater involvement of the private sector in the delivery of quality education' (p. 23). This is listed as a priority, rather than

as the solution to a specified problem. It is an article of faith. As with St. Kitts and Nevis, public-private partnerships are seen as vital to improving funding for early-childhood provision.

## Trinidad and Tobago

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Trinidad and Tobago (T&T) is a twin-island republic situated north east of Venezuela in the southernmost anglophone Caribbean with a population of approximately 1.4 million people. The former British colony is a member of the Commonwealth and CARICOM.

With respect to education, T&T achieved universal access to primary education and universal secondary education in 2000 (UNESCO-WDE, 2010); however, issues related to equity and performance are still pervasive (De Lisle, Seecharan & Ayodike, 2010; UNESCO-WDE, 2010). The education system consists of both public and private schools at all levels of education spread across eight education districts. Public schools, in particular, include government-owned and government-assisted/ denominational schools centrally managed by the Ministry of Education with devolved responsibilities at the school level through local or denominational school boards. Primary education is compulsory (UNESCO-WDE, 2010).

Expenditure on education as a percentage of total GDP (2003) is 3.14% and the adult literacy rate (2010) is 98.7% (UNESCO, 2021). Education is state funded through the provision of public early childhood care and education (ECCE) centres, primary and secondary schools and tertiary level institutions. Education usually begins at age three at the pre-primary or ECCE level with most students completing secondary education at ages 16–17. Tertiary level education is also supported through several scholarship grants to local and international institutions/universities. T&T has several local universities, including the University of the West Indies (St Augustine), the University of Trinidad and Tobago and the University of the Southern Caribbean. There are also several community colleges and foreign-based university centres operating in the country.

The minimum entry requirement for teaching is five Caribbean Examinations Council (CXC) General Proficiency O' Level subjects (corresponding to Level 2 of the Regulated Qualifications Framework (RQF)). However, a Bachelor's degree is also required for entry into secondary school teaching (MOE, n.d.).

Trinidad and Tobago's government set out its strategy for education in its policy (White) paper 2017–2022 (Trinidad and Tobago Ministry of Education, 2017). The White Paper 'recognises that education is a primary

medium for economic and social development and transformation’ (p. 17); however, it also acknowledges the wider range of educational goods, including the way education ‘improves citizens’ social status and skills as well as access to networks ... [it] reduces violence and inequality, encourages a sense of citizenship, and improves the health status and life expectancy of citizens’ (p. 17). This framing is commendably holistic; the White Paper nonetheless reveals a commitment partly to exogenous, but mostly to endogenous privatisation in education. This latter can take different forms; turning first to how schooling structures are made to resemble those in the private sector, Trinidad and Tobago sets out in the White Paper to create a school-based management model, where responsibility for school operations is devolved to the school level. This policy is very similar to the school-based management (SBM) policies adopted in England, Australia and elsewhere from the 1980s. There is abundant evidence that locates SBM within a privatised, marketised and managerialist conceptual framework (see e.g. Lingard, 1998; Smyth, 2011). School leaders are re-positioned through SBM as business CEOs, concerned with attracting students, constructed as ‘customers’.

Concerning exogenous privatisation, the White Paper declares explicitly an intention to ‘facilitate private sector engagement in support of the needs of the education system’ (Trinidad and Tobago Ministry of Education, 2017: 50). This remit is extraordinarily wide, far exceeding the infrastructure-related appeals of other states in the region. Despite this, the many substantive policy statements in the Paper rarely mention the private sector, indicating that there are no specific plans to engage it, and/or the MoE intends retaining the outlined responsibilities. Privatisation is therefore enabled, but only sketchily through this document. This is not necessarily reassuring; Ball (2008) identified a similar process and outcome associated with a major statutory reform of education in England in 1988; the possibility of later privatisations promoted through the Act were ultimately more significant than its substantive privatising elements.

## Questionnaire report

The following survey results are drawn from a small, non-representative sample and are, therefore, not statistically generalisable. We intend for them to supplement data from the interview and documentary strands.

### Parent survey

Of the 64 responses, 60 were from Barbados and 4 from Trinidad and Tobago. The Barbadian responses came from the nursery ( $n = 4$ ); primary ( $n = 6$ ) and secondary sectors ( $n = 50$ ). All four Trinidad and Tobago responses were from the primary sector, and three of the responses were from women. In the Barbados sample, 43 of the 60 respondents were women. 32 respondents reported that their child's school was 'better than average', 31 thought it was 'average' and one stated it was 'worse than average'.

Respondents were asked how evident seven items from the longer list of privatising features were, in their experience (the other items on the list not being applicable to parents). Responses were either a) not at all ( $=0$ ); b) somewhat evident ( $=1$ ); or very evident ( $=2$ ). A 'don't know' response was possible, but not counted in the analysis. We calculated the mode of their responses in order to arrive at the following ranking, from most to least evident:

1. You choose the school that your child attends ( $0=12$ ,  $1=20$ ,  $2=32$ ).
2. You pay additional fees for essential items, e.g. textbooks, paper, pens ( $0=14$ ,  $1=18$ ,  $2=32$ ).
3. You pay for private tuition ( $0=31$ ,  $1=11$ ,  $2=22$ ).
4. You pay additional fees for extra-curricular activities ( $0=37$ ,  $1=15$ ,  $2=12$ ).
5. Teachers have a professional qualification ( $0=41$ ,  $1=13$ ,  $2=10$ ).
6. Teachers sometimes teach outside their specialism (e.g. age group or subject) ( $0=39$ ,  $1=21$ ,  $2=4$ ).
7. School places are accessed through vouchers ( $0=62$ ,  $1=2$ ,  $2=0$ ).

When asked which of these features impacted them most as parents, their collective ranking was as follows: parent choice (28 mentions); private tuition (27); teacher qualifications (26); fees for essential items

(23); fees for extra-curricular activities (15); teaching outside specialism (9); and vouchers (1).

The high position of private tuition reflects the importance of the 11+ exam taken by all pupils at the end of primary schooling in Barbados. Parents pre-select a small number of hierarchically differentiated schools, and their child's exam performance determines which they will attend. It is therefore both the parents/child and the school which selects. One parent described the impact of this: *'privatisation at primary level already results in disparity of results at the time of the secondary entrance exam. This is not good socially'*. Ostensibly public education masks the extra costs associated with schooling, but these impact heavily on parents. One reported that she is *"not working and it makes it hard on their father to have to get the things they need then have to pay for the extra"* (Barbados, secondary). Where textbook loan schemes are available, parents report that they appreciate these.

Concerning the impact of these features on their child's education, the respondents' collective ranking was as follows: teacher qualifications (38); parent choice (20); teaching outside specialism (20); private tuition (17); fees for essential items (13); fees for extra-curricular items (5); and vouchers (1). This reflects findings from the documentary analysis, where relatively low rates of teacher accreditation are an issue across the region. Further, inter-school differences in these rates contribute to the hierarchisation of provision, which in turn drives privatisation, e.g. through private-tutor hire. This might be to raise the likelihood of admission to a school with more qualified teachers, or to make up for what parents perceive as poor teaching quality.

Twenty-two respondents thought that privatisation had increased in the last five years, thirty-nine thought it was about the same, and two thought that it had decreased (one skipped). Parents who thought that it had increased gave reasons including the following:

*"More parents opt for private lessons because the public school is too full" (Barbados, secondary, male).*

*"Ministry of Education has less money?" (Barbados, secondary, female).*

Parents suggested a range of policy advocates for privatisation, although nobody who might count as a 'policy entrepreneur' (see e.g. Anderson and Donchik, 2016), who individually stands to gain economically or symbolically from such advocacy. Instead, suggestions of policy advocates included parents and government; the latter because privatisation would be *"less burden on the public purse"*. Concerning resistance to



privatisation, parents suggested key actors included teachers, unions, parents, and *“the people of Barbados because we simply can’t afford it”*. In this survey, wealthier parents are constructed as advocates of privatisation, and poorer, or more ideologically resistant parents are the key opponents. Lobby groups or vocal policy entrepreneurs have not gained traction with these respondents.

Finally, we asked how important a range of factors were in influencing parents’ school choice. Their collective ranking was as follows, from most to least important:

1. The school has a good reputation for educating children like mine.
2. I thought my child would be happy there.
3. My child wanted to go there.
4. School position in league tables.
5. Best impression by the principal.
6. Best impression during open day.
7. The school is the closest to home.
8. Cost.
9. Sibling already attends.

Parents are apparently willing to forgo a degree of convenience to select a school which ‘fits’ their child. These dispositions underpin key tenets of marketised school systems (see Courtney, 2015b).

## Teacher survey

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There were 11 respondents to this survey, from Trinidad and Tobago (n = 6, including early childhood, primary and secondary—all women); Saint Lucia (n = 1, man, secondary); and Barbados (n = 4, all women in secondary schools). All had a teaching qualification, except for the teacher from Saint Lucia. These qualifications ranged from a certificate in teaching, through a diploma and bachelor’s degree, to master’s degrees. Seven respondents described their school as average in terms of the socio-economic status of the community it serves, with 3 reporting it to be disadvantaged and one advantaged. One teacher, from Barbados, drew attention to the correlation between schools like hers, that take pupils who scored between 0% and 20% in the common secondary-school entrance exam, and socio-economic disadvantage.

These teachers were asked to state how evident various privatising features are in their context and experience, from 0 (not at all evident)

through 1 (somewhat evident) to 2 (very evident). The list comprised 16 items, drawn from the longer list of 26 items (see Appendix One). We calculated the mode average and ranked them from most to least evident. This ranking is as follows:

1. Teachers may be hired on temporary contracts (0=0; 1=3; 2=8)
2. Parents select the school their child attends (0=1; 1=5; 2=5)
3. Teachers undergo annual performance management (0=2; 1=4; 2=5)
4. Teachers may teach outside their specialism (e.g. age or subject) (0=1; 1=8; 2=2)
5. Parents pay fees for essential items (0=5; 1=3; 2=3)
6. Schools' performance is ranked in national league tables (0=5; 1=3; 2=3)
7. Parents pay fees for extra-curricular activities (0=5; 1=4; 2=2)
8. Standardised testing of pupils is used to evaluate teacher performance (0=5; 1=5; 2=1)
9. Your school competes with private institutions (0=6; 1=4; 2=1)
10. Your school leads initial teacher education programmes (0=6; 1=5; 2=0)
11. Private sector provides CPD to teachers (0=6; 1=5; 2=0)
12. Employment conditions (not pay) determined by school (0=7; 1=4; 2=0)
13. Teachers' salaries individually negotiated (0=9; 1=1; 2=1)
14. Teachers' salary schools determined by school (0=10; 1=1; 2=0)
15. Teachers' salaries are linked to individual performance (0=11; 1=0; 2=0)
16. Teachers' salaries are linked to their students' test/exam scores (0=11; 1=0; 2=0)

For 12 of the 16 measures, the most common response was 0, meaning that teachers largely do not experience or perceive significant privatisation in education. This is not the same as arguing that none exists.

We asked teachers which of these features impacts most on them as teachers. The feature receiving most nominations (four) was; *"Your institution leads or would lead initial teacher training (rather than a university)"*. The following three features received three nominations each: *"Your school is ranked nationally in league tables of school performance"; "Standardised testing of pupils is used to evaluate teacher performance";*

*“Employment conditions not related to pay are determined at the school level (e.g. working hours, holidays)”.*

Teachers did not necessarily describe this impact as negative. For instance, one reported that *“The teacher training programmes conducted by the institution (i.e. school) assists with practical and theoretical training which assists with interaction”* (Trinidad and Tobago, early childhood, female, 6–10 years’ experience). The same respondent had a similarly positive view of parent choice based on school performance: *“having parents choose the school because they heard how well we teach and take care of the children motivates me to continue to be better and learn new techniques to assist both the child and their parents”*. We see a relationship between these two statements. Different knowledge, drawing on different traditions and epistemologies, is produced in schools as opposed to universities (see e.g. Gunter, 2016). Schools enculturated not to perceive the privatisation happening there will not be able to problematise that in their subsequent initial teacher training (ITE) provision and practices, and so may well see only positive outcomes arising from their school’s leadership of ITE, or parent choice. They are also consequently more likely to reproduce in the next generation of teachers their uncritical response to privatisation.

Whilst not impacting broadly across the cohort, teacher performance management drew comment from one respondent (Barbados, secondary, female, 16–20 years’ experience):

*The in-school teacher evaluations done are very, very flawed and serve no purpose. They are not used to determine anything with regards to the teacher’s future employment and promotion. They are done by fellow co-workers and never with any input by any individual from outside the school who may have an unbiased view. They result in evaluations full of glowing reviews for teachers who supervisors like and questionable reviews for teachers they do not like. There are too many teachers who are not only underperforming but they are often absent from work and they in some cases receive more employment benefits than others who are often and always present for work and work extremely hard going the extra mile for their students, in the classroom and at extracurricular activities. It happens all over in public schools.*

Performance management is here constructed not as a means of improving teaching systemically or even school-wide, but as a micro-political tool whereby power hierarchies and relations are variously created, maintained and disrupted for local and individual reasons.



When asked about the impact of these features of privatisation on the education system, one feature in particular attracted consensus; “pupil enrolment is based on parent choice” (5 mentions), despite the existence of secondary school entrance exams in both Barbados and Trinidad and Tobago. Parent choice is illusory, in this sense. Again, teachers did not always perceive school choice negatively. One framed it as “parents choos[ing] schools that they were recommended as they know that their child will succeed in that school” (Trinidad and Tobago, early childhood, female). Another teacher actively wishes for increased privatisation features:

*“Not having an annual review (it’s every three years) can result in issues going unchecked and making for negative or less than ideal situations. Having things like bonuses for individual performance would offer great motivation for teachers and could increase effort” (Barbados, secondary, female).*

This teacher accepts the discursively dominant unproblematic and linear relationship between a teacher’s individual skill and commitment, and her students’ attainment. Other teachers, however, identified and were critical of the *“continued stratification of students”* (Barbados, secondary, female) that underpins school choice, and of its impact on individual, low-ranking schools. The aforementioned respondent also noted that this is a policy choice: *“this ranking has been maintained over many decades even as new secondary schools have been opened”*.

Ten of the eleven teachers surveyed thought that the level of privatisation had remained around the same for the last five years, with one perceiving an increase. As in the parents’ survey, the most commonly suggested advocates for privatisation were parents with means. Those suggested to be resisting include *“the public school system—as it caters to every person in the country and not only for those who are advantaged”* (Trinidad and Tobago, early childhood, female), and also government itself.

## Leader survey

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Twenty-one leaders responded to this survey, from Jamaica (n=2, primary and early childhood, both female); Trinidad and Tobago (n=5, early childhood, primary and secondary; male and female); Guyana (n=3, primary and secondary; male and female); Barbados (n=8, primary and secondary, male and female); and Saint Lucia (n=3, primary and secondary, male and female). All had a teaching qualification, except for one primary headteacher from Guyana. Fourteen described their

school's socio-economic context as average; one as advantaged, because it was located in the capital; five as disadvantaged and one as very disadvantaged. These are perceptions, however; we note that the Guyanese head who called his school only 'disadvantaged' also reported that it had "*no electricity. No potable water. No internet access*", which raises questions concerning what 'very disadvantaged' might look like.

These respondents were asked about 26 of the 27 features of privatisation (enumerated in Appendix One). We asked first how evident these privatising features are in their context and experience, from 0 (not at all evident) through 1 (somewhat evident) to 2 (very evident). We calculated the modes of their responses, and arrived at this list of the ten most evident features.

1. Pupil enrolment is based on parent choice (0=4, 1=2, 2=15)
2. Teachers may be hired on temporary contracts (0=5, 1=4, 2=12)
3. Your school is ranked nationally in league tables of school performance (0=5, 1=6, 2=10)
4. Teachers undergo an annual performance management review (0=5, 1=6, 2=10)
5. You are responsible for your school's budget (0=4, 1=9, 2=8)
6. Personnel/HR decisions are devolved to the school level (0=7, 1=8, 2=6)
7. All your teachers have a professional qualification (0=7, 1=9, 2=5)
8. Your school competes with private schools (0=10, 1=4, 2=7)
9. Parents pay additional fees for essential items (e.g., textbooks, pens) (0=8, 1=8, 2=5)
10. Your funding is based on a voucher system (0=10, 1=5, 2=6)

Three features received the same, lowest-possible score (i.e. 0=21). These were "*teachers' salaries are individually negotiated*"; "*teachers' salary scales are determined at the school level*"; and "*teachers' salaries are linked to their students' test/exam scores*". These features can reasonably be said not to exist in the jurisdictions represented in this survey. For 18 of the 26 features, the most common response was 0, meaning that features of privatisation are most commonly not perceived by these school leaders.

The top-three most impactful of these features on the respondents as leaders and on the schooling system were the same for these leaders: 1) "you are responsible for your school's budget" (11 nominations); 2) "your school is ranked nationally in league tables of school performance" (10); and 3) "pupil enrolment is based on parent choice" (8). There is a wealth of literature from elsewhere in the world that explores these features,

including in relation to a wider discourse on school autonomy and the creation of quasi-markets in education (see e.g. Whitty, 1997). A further body of literature relates the impact of this marketised and corporatised landscape on school leaders' identities and practices (e.g. Courtney, 2015a; Courtney and Gunter, 2015). The marketisation signified by these features changes fundamentally the nature and purposes of school leadership, as well as how school leaders are expected to make sense of their own role and identities in this. Leadership knowledge becomes commodifiable (Courtney, 2015a) and leaders have to 'sell' themselves as much as the school (Courtney, 2016). In this context, it is unsurprising that these leader respondents are feeling the impact of marketisation. However, just as Grace (1995) found in England, some school leaders enjoy the reconfigured role that marketisation affords them; one respondent reported a "positive impact as school image is boosted and the administration has more autonomy in decision making" (Saint Lucia, secondary, male). Another reported that advocates for privatisation included "*principals' organisations based on comments at meetings. Many principals express the view that they would like more autonomy in decision making*" (Trinidad and Tobago, secondary, female). This reflects analysis (e.g. Hughes et al., 2019) demonstrating how certain school leaders invest in the new identities made possible through privatisation, and its accompanying discursive entrepreneurialism.

Other respondents recognised the negative impact of marketisation, and hence a hierarchised landscape of provision, on the system:

*There is a subtle ranking of schools and my school is 'ranked' below most by parents. In this regard, we will receive those students with cognitive and behavioural challenges which require a different level of preparation and planning. This ranking impacts on the self-concept of our students and we as a school have to work very hard to lift it. Additionally and unfortunately some of our teachers are not prepared and trained to teach the typical student at our school which will have a significant impact on the teaching and learning environment. (Barbados, secondary, male).*

This extract illuminates the interplay between the features: the widespread regional issue with the non-accreditation of teachers is not evenly distributed, but is clustered in certain schools and becomes meaningful in the market, contributing to the hierarchy of provision.

Four school leaders considered that privatisation had increased over the last five years, 13 thought it had remained about the same, and four saw a decrease. This was not attributable to the nation in which they were located.

## Interview data report and analysis

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From the interview data, three main themes/claims emerged that point to privatisation in and of education.

These are: (1) Favourable conditions for education privatisation exist, (2) Ubiquitous endogenous privatisation is regarded as education modernisation and (3) Exogenous privatisation seems provisionally welcomed. They are explored below.

### **Claim 1: Favourable conditions for education privatisation exist**

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Generally, interviewees, in thinking about their respective countries, seemed to communicate a set of fundamental values and beliefs in relation to education provision in the Caribbean. These fundamental values and beliefs, which run counter to education privatisation promotion and adoption, include: (1) education, as a public good, should be state-funded; (2) education providers must be educated and trained in education and education-related disciplines; and (3) performance-related pay of teachers is unwelcomed. Yet, though these appeared to be held to strongly, participants did recognise within their country contexts increasing tendencies towards privatisation in and of education because of existing policies and practices which unwittingly provided favourable conditions for the promotion and adoption of education privatisation in the Caribbean – a finding consistent with that of Ball and Youdell (2007).

These conditions include: (1) the existence of education markets, where competition for ‘preferred’ schools is prevalent; (2) limitations in state-provided education; and (3) pressure on the state for education reform. Because the quality of schools, particularly at the primary and secondary levels, across the Caribbean is highly variable, parents tend to choose higher-performing schools for their children, which incidentally tend to be urban, denominational and/or private fee-paying schools.

*[T]here are choice schools, which parents do choose and some of them have a population of 600, whereas you might have a school within what you call your country area and that may have 85 students, which is a situation that is not fair (Principal, Barbados)*

All interviewees, though recognising the strides made by their countries in the provision of state-funded education, mentioned the existing limitations in that provision. In some cases, for instance in Trinidad and Tobago and St Lucia, state-funded provision of ECCE was non-existent up to approximately a decade ago and, though now provided, is fraught with legislative issues pertaining to school management and teachers' terms and conditions of employment. A teachers' union representative from Trinidad and Tobago shared, "[W]e have so many problems with [university] graduates coming out of those programs being able to access proper salaries because they're not being put [by the ministry] in the correct positions after they have attained their degrees". In Barbados, ECCE state provision is inadequate to satisfy national needs as explained by a Barbadian Teachers' Union representative:

*The key factor is the lack of government investment in the area [of ECCE]. I'm sure if Government were to improve its investment in these areas, there will be a change in the situation because where Government has the [ECCE] centers, they are always oversubscribed...*

Tertiary-level education provision across the Caribbean appeared to be most deficient. Having a few regional higher education providers, the region attracts much tertiary-level, private-sector involvement, especially from international entities. A regional body representative illuminated this situation, saying:

*[W]e are aware of the massification – for want of a better word – of privatisation of higher ed[ucation] that is coming in the region... offering qualifications where at the national level they did not have the capacity to offer those qualifications.*

Additionally, across the four country contexts represented by interviewees, state funding of education is consistently considered to be inadequate as best articulated by one school principal, who explained:

*The government provides what they call a grant, which must last through the whole school year, but it's never enough... and it has never increased, even though there is the COVID-19 situation and we have to use more chemicals and more sanitisation is being done. That grant still has to cover that along with other things in the school.*

School under-resourcing appeared to be a main issue for countries in the region. In Belize, funding for meeting operational needs had



become common-place among state-owned schools, as described by the Teachers' Union representative of Belize:

*[I]n Belize..., especially at the elementary level, the management of the school or the schools themselves have to pay for all their bills. So, the government doesn't provide; the government pays for all of our teachers' salaries [and students' books] and then the school would say charge a fee, a little school fee and that is where they get to pay the electricity bills and then the water bills and other bills that they have to pay as they go through.*

What this means is that the financial expenses of schools are being passed to students' families, who may not all be able to afford paying for what is offered as 'free'.

Situations such as these also contribute to another condition that makes the region 'ripe for privatisation', that is, abiding pressure on the state for education reform—a condition mentioned by all interviewees. Such pressure, while originating from different stakeholders, such as parents, was, as might be expected, most forthcoming from teachers' unions, as alluded to by the St Lucian Teachers' Union representative, who clarified, *"When it's time for negotiations for salaries and conditions of work, we are very forceful on that but throughout the year we are also very forceful on matters of education, teachers' professional development, quality education etc."*

## **Claim 2: Ubiquitous endogenous privatisation is regarded as education modernisation**

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Across the Caribbean region, privatisation in education was evident in several forms, including: (1) in the creation of quasi-markets, (2) the employment and performance management arrangements for teachers and (3) the more business-like approach to education management. In all the countries represented by interviewees, competition among schools, particularly at the primary and secondary levels, had become commonplace with the introduction of national publishing of top performers, scholarship winners and top schools in various national and regional standardised examinations. This practice has resulted in the creation of quasi-markets in which these 'league tables' become a form of market information for parental school choice.

*What has happened in the last five years is that... the [education] minister on the day of releasing [the Common Entrance Exam]*



*results she usually mentions the names of the top ten students in that exam. For the last five years or so, it has been dominated by these small private schools... So, a lot of parents work on moving some of their children to these schools (Teachers' Union Representative, Barbados).*

Education has become so competitive that students participating in paid extra lessons and doing practice tests provided externally to their schools are common, particularly in Trinidad and Tobago, where public education is increasingly becoming corporatised, as related by a Teachers' Union representative:

*[T]his particular organisation... provide[s] testing material for students. So, they will run little motivational competitions and give you little prizes or tokens if you do this week's test really well and so forth. It is making us as a society at the primary level, more exam-oriented and more competitive because not just one child would be competing against another, entire school bodies... will be competing against your school to vie just for the public recognition by this organisation because it's published in the newspapers... So, it's making our SEA [Secondary Entrance Assessment] examination... more competitive.*

Two knock-on effects of the publishing of these 'league tables' are then created. One is that the created quasi-markets influence the ways in which the quality and relative value of schools are judged by the public, by teachers in selecting schools to work in and by parents, in particular.

*[W]e have private schools in Barbados and... they do a better job sometimes than us because their class sizes are smaller and somehow they get more support in some form or other, I'm not sure how, but in terms of the Barbados Secondary Schools Entrance Examination results, some of them normally come out on top and we normally have our public schools who are struggling... Some people are not happy with the public schools. I'm being very honest. I've had persons since COVID-19, who have moved their children from the private schools because of the inability to pay but if they had the money, they would continue with private schools because somehow the private schools have something about them that we do not have at the public schools (Principal, Barbados).*

This in turn results in increasing numbers of parents selecting private primary schools rather than public primary schools for their children, causing, according to Ball and Youdell (2007), the residualisation of public

schools, as private schools get ‘desired’ students and solidified places in the market. Quality education then becomes viewed as a private commodity.

*For the last five years or so, [the top performances in the Common Entrance exam have] been dominated by these small private schools. So, a lot of parents work on moving some of their children to these schools. You know, if I try these schools my child would probably do very well at that exam... every parent wants their child to get into the six or seven top secondary schools in Barbados (Teachers’ Union Representative, Barbados).*

With respect to employment and performance management arrangements for teachers, Caribbean ministries of education have begun discussions on performance-related pay and have implemented practices that appear to be neoliberal in nature, reducing their financial commitments in selected areas as exemplified by the following extracts:

*Contract employment is something that the state has been trying to put, not just into the public sector, but internally widespread in Tobago... [I]f [a] school [has] two mathematics teachers but our pupil intake requires us to have four mathematics teachers, the Division of Education in Tobago will hire two extra teachers on contract but they don’t get their contract documents, they don’t get their contract gratuity on time, their salaries are late and at the end of the day, many of them leave, and so the students are shortchanged (Teachers’ Union Representative, Trinidad and Tobago).*

*If you were to ask the ministry officials or the government, they would say to you that teachers do get a good salary. If you were to ask the teachers, they would say it’s not enough for the work that we do... So, for example, a teacher who has an associate’s degree, just maybe entering the teaching profession would probably be getting a salary of about 600 US\$ per month. For us, that’s not good enough (Teachers’ Union Representative, Belize).*

Such practices have the potential to attract lower quality teachers or individuals with lower qualifications into the teaching service. Attrition rates may also begin to increase. These then translate into low-quality public education, which increases susceptibility to privatisation.

Modernising public-sector education has seen a shift towards education management and provision becoming more business-like. Indeed, mechanisms such as performance-related pay and other terms of

employment devices originate from the business sector and are lauded as essential to increasing effectiveness and efficiency. Over the last decade, according to interviewees' accounts, aspects of business, such as the language, have been promoted, used and embedded in the day-to-day practice of education at all levels. One evident shift is the corporatisation of the language used in education in the region, where parents and students are viewed as clients or customers and notions of agility, responsiveness and accountability are accepted and expressed without users recognising a shift. One interviewee referred to this as the 'language sneak':

*[W]hat might be considered traditional organisational structures and positionings of the public sector is shifting. I mean, it's a slow shift, it's not happening overnight, it's a slow transformation, I would argue, where we are moving towards that more corporate notion of service and... we're beginning to talk the language. It's shifting to words such as customer and client... [E]specially within education, it is recognised that that public sector transformation is needed and so part of that public sector transformation, apart from the rearrangement of some of the infrastructural changes that are taking place within member states and ministries of education is the language sneak that is coming in... [W]e also have to consciously be interrogating some of those languages (Regional Body representative).*

### **Claim 3: Exogenous privatisation seems provisionally welcomed**

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As mentioned earlier, interviewees all felt it the responsibility of nation states to fund public education. However, where there was an evident lack in such education provision, private-sector involvement was welcomed to fill the gap. Consequently, across the region, private-sector entities ranging from private individuals to local companies and international institutions and organisations are engaged to provide core education services, such as education consultancy, continuing professional development, and non-core or complementary education services, such as cleaning and building maintenance and food services. Involving the private sector into public-sector education includes government contracting out education services, as most evident in Trinidad and Tobago and reported in Belize.

*There are a number of education consultancy companies across the country..., [that] offer education services: giving private lessons,*

*producing resource material and so forth. What we have found is that one company in particular... [which] would have been contracted by the Ministry of Education to produce resources for the students which are not necessarily being distributed free of charge... [is] now in the process of conducting different surveys and different bits of research for the Ministry of Education [which] the ministry can conduct, either through its own department or through partnership with [a local university] (Teachers' Union Representative, Trinidad and Tobago).*

*We have a gentleman who works with the ministry. He's not Belizean... but he has put together a phonics booklet and the ministry has had our schools using or getting them to use that booklet that this gentleman has produced... [W]e have another local Belizean, who I guess, having looked at all of the different phonics programs around, he has come up with his own books, localised them to suit the Belizean situation and we have been using those books for quite a while and we have found that those books that he has created, this deacon... has helped because he had focused on those students who are Spanish speakers and needing to learn the English language and... we have found where children of other cultural backgrounds and ethnicities have been benefiting from using that program... He uses the money, some of it... to support and furnish his schools with supplies... (Teachers' Union Representative, Belize).*

At the ECCE and primary levels, in particular, private-sector education provision is usually in the form of unregulated small-scale school start-ups usually by individuals who are practising or retired teachers as explained by Teachers' Union representatives:

*[A] lot of private schools are small and there would be probably, like, maybe retired teachers, and persons who have that general interest that may start a school but it's not a massive like injection of finance coming from any multi-national or local conglomerate or anything like that (Teachers' Union Representative, Barbados).*

*Because of the need, the demand at the early childhood sector level and the government's lack of investment in that area, yes, there is in fact an acceptance of individual involvement... It is usually a very well-known community person, maybe a former teacher that has gained acceptance within the community... (Teachers' Union Representative, St Lucia).*

At the tertiary level, however, private-sector involvement is, as expected, on a grander scale with a great influx of foreign organisations and universities investing in public education for profit, raising, at times, cause for concern.

*[W]e are attending to the privatisation issue because it is raising concerns in member states. One of those concerns is to ensure that we do not have those university mills popping up that are very predatory and ensuring that the appropriate measures for quality assuring the qualification that students gain from those private tertiary institutions, whether they're coming from outside of the context or whether they're inside of the national context [are put in place] (Regional Body representative).*

*[W]ithin the last few years we have seen some colleges coming into Saint Lucia, not registering as schools or educational institutions; they are registering under the Business and Investment Act and so they are running businesses providing education and, of course, at the university level we have a few offshore universities, mainly medical schools... (Teachers' Union Representative, St Lucia).*

Regionally, at the school level, too, private-sector involvement is welcomed and often sought after to meet the needs of schools. Principals' ability to co-opt private-sector entities is considered an asset in school management.

*[T]he government provides what they call a grant, which must last through the whole school year, but it's never enough. So, therefore, you have to be willing to ask private-sector entities for sponsorship. The school I was last at, I asked a supermarket near to the school to sponsor the school and they sponsored to the tune of \$12,000.00 for sporting equipment and supplies and stuff for the students. And they actually allowed us to use their name in our sporting activity... If you are..., I would say, a good beggar, you normally get things done... [T]here's one donating cleaning supplies to my school (Principal, Barbados).*

How the private sector benefited from these school-level involvements seemed not to be immediately clear to interviewees, generally, and likewise concerning supranational organisational involvement in public education in nation states. While a few participants were able to identify contributions and or partnerships at the national level with organisations, such as the International Monetary Fund (IMF) and the United Nations (UN), and even name specific initiatives, such as the IMF-sponsored

Barbados Economic Recovery Transformation (BERT) programme, none were able to elucidate on the extent of these organisations' involvement in the provision of the respective countries' education in relation to privatisation. This is made most evident in the comment of the regional representative, who said, *"I don't know if there is a lot of conversation around privatisation in education and the problematic of the agenda."* This, to some extent, speaks to the 'hidden nature' of education privatisation.

Moreover, interviewees had differing views on the overall impact of privatisation in and of education in the Caribbean region. While a few were hard pressed to visualise any impact, some guardedly saw privatisation as presenting opportunities for education in the region in relation to modernising education as earlier discussed. A few others, however, expressed cause for grave concern in relation to education quality and equitable access to disadvantaged groups of students and those adversely affected by the present COVID-19 pandemic.

*[Privatisation] is now something that is burgeoning because we have had a very robust public sector previously prior to the COVID-19 pandemic. What we anticipate is that level of disparity and inequity between different groups of students, those who can afford and those who can't?... So, God forbid, if that privatisation trend continues the way it is unabated and the state does not look to put mechanisms in place to regulate what private organisations do and how they operate and how they use them then we can foresee that level of inequity in terms of student access and student achievement increasing... [T]herefore, our talk as a country about maintaining or attaining SDG 4 would just be that – talk (Teachers' Union Representative, Trinidad and Tobago).*



## Mapping privatisation in and of education in the Caribbean

In this section, we explore some of the main implications of our data and relate them to insights from the literature. It is well established that privatisation requires public services to be underfunded in order to legitimate private involvement (Saltman, 2010, 2015; Verger et al., 2016); this may be discursively framed as shrinking the state to enable the private sector to enter and flourish (Croso & Magalhães, 2016). In our study, we received reports from across the Caribbean that this underfunding exists and is endemic. This considerably raises susceptibility to privatisation, particularly where supranational organisations such as the International Monetary Fund require neoliberal restructures in order for funds to be released. Barbados (see above) is the only one of the ten countries explored here still with an active IMF loan (International Monetary Fund, 2021), but see Appendix Two for an overview of recent IMF-mandated or advised structural reforms.

The states that we explored are variously more or less committed to privatisation as a key mechanism to modernise education provision and improve outcomes. Policy texts are often framed in language that borrows from discourses of privatisation. We read what Ball (2009: 93) has called “a reiterative stream of ‘solutions’ and ‘best practice’ and ‘evidenced’ developments [which] are ‘offered’ through reports, ‘research’ and ‘evaluations’ which seem almost always to privilege further privatisations or ‘business-like’ methods”. This goes beyond exogenous or endogenous privatisation, and provides evidence of ‘the colonisation of the infrastructures of policy’ (Ball, 2009: 88). Ball is referring here to exogenous privatisation of policy infrastructure, and whilst this may be happening, we have no data to support it. Nonetheless, we have identified through policy analysis an endogenous colonisation, in which ministers, state officials and other policy makers internalise, normalise and enforce privatisation. This was particularly evident in the data from the Regional Body representative, who argued for ‘the need to reduce the bureaucracy of the public service and ensure that it has greater agility and responsiveness’, and noted further that ‘I don’t think anybody is going to push back against agility’. We conclude that as has been the case internationally (see e.g. Gunter, 2012), privatisation has become collocated with modernisation such that its features become normatively desirable and alternatives unthinkable; they would be perceived as an



absurd call for retrogression. We therefore see privatising reforms to education as a default. However, at the same time, participants from national-organisation to school level seem to embrace this default, seeing it as a desirable as well as inevitable mechanism for change.

There is nothing inevitable about privatisation: it is clear, for instance, that a case can easily be made against agility, and the insecure working conditions that underpin it, yet that case cannot be made effectively whilst its discursive assumptions of such a counter-case are positioned as retrograde, as symbolising primarily an inflexible bureaucracy rather than education for the common good. Selection at the end of primary education establishes the notion of schooling as competitive, meaning that participants are more likely to accept ancillary features of privatisation which flow from this fundamental premise. The repercussions of selection and competition are already felt widely, through increased inequity within systems and the concomitant perceived unfairness of differential resources and teacher professionalism, evidenced in teaching accreditation. An important indicator of privatisation is the re-configuration of teaching from a profession to a craft; this shift in conceptualisation permits a host of collocated assumptions and structural features to take hold. An example assumption is that as a craft, almost anybody can be trained (not educated) in how to do it, given the right script and a sufficiently pared-down curriculum (Gorski and Zenkov, 2014). In turn, these assumptions lead to degraded teacher working conditions, including precarious, short-term contracts. The negative effect of these in multiple education sectors is well documented; in higher education, O'Keefe and Courtois (2019) remind us that precarity is often gendered and serves to 'other' the precariously employed within the organisation. Writing of precarity in the field of language education, Breshears (2019) suggests that precarity may sap professionalism, prompt teacher attrition and fatigue, and inhibit teachers' professional development.

However, whilst resistant voices have been raised in our data, for the most part, parents, teachers and school leaders are supportive either of privatisation generally, or of its key constitutive practices and dispositions, perhaps whilst claiming to be against privatisation in principle. This also applied to a greater extent to the Regional Body representative and to a lesser extent to the Teacher Union representatives. The latter were sometimes unaware of the range of features that indicate privatisation and so did not know to oppose them, or what they might lead to.

The key actors involved in privatisation are distinctive, when compared to other developing regions. We received few reports of major corporations

intervening exogenously to supplement or provide education services or provision in a wide-spread, strategic fashion. The private sector in our study was as likely to consist of a local businessperson ‘made good’ or a business spun out from a religious mission, as a multi-national edu-business. A caveat here is that much of the data were characterised by participants’ lack of awareness of privatisation in education and of its forms and implications, and so it may be that this large-scale work is happening unperceived. However, it may equally be that the reports are largely accurate, which means that the Caribbean is presently within a narrow window, i.e. after the conditions have been established to render states susceptible to privatisation, but before the big companies have moved in. Time is therefore short to effect any changes in policy or disposition.

The case of Belize is a further reminder that the ‘private’ comes in diverse forms and has differing interests. A Kansas mission established a company which is the largest producer of textbooks there, and so the state’s weakness provides an opportunity for that company to influence both the curriculum and pedagogies, notwithstanding any wider goals envisaged by the state for education. The heterogeneity of the private in privatisation reminds analysts to explore particularities of corporate mission and intersections with other interest groups, here, religious. In Belize, the focus of this major private actor is the Belizean soul rather than its economic productivity, yet either way, it demonstrates the limits of the state’s, or the public’s authority over education. Therefore, de-publicification is just as important as privatisation.

Trade unions are an important bulwark against privatisation, yet often display an ambivalent attitude towards it, owing to competing tensions in the education landscape. First, market-based reforms that seek to weaken educators’ pay and working conditions and defund education provision may supply the focus for union campaigns. This is evident from the first statement, a rallying call, on the website of the UK’s National Education Union:

*‘There is a crisis in education. Funding cuts are hitting schools, workload is at a record high and the assessment and accountability system is broken, driving excessive workloads. Add to this eight years of barely rising pay and it is no wonder there is a recruitment and retention crisis.’ (National Education Union, 2021, unpagged website)*

However, Stevenson (2007) points out that much trade-union activity has been predicated on building a ‘social partnership’ (p. 241) with government. This form of trade-union organising in England foregrounds

'the desire to identify a common-interest agenda with government and to pursue forms of integrative bargaining ... in which both sides seek to identify the scope for mutual advantage' (Stevenson, 2007: 241). This approach necessarily involves giving the impression of accepting some of the foundational assumptions of the state's arguments for reform, and so advertently or inadvertently, central planks of the privatisation agenda are not contested and, reified in mutually agreed policy, become subsequently more challenging to oppose. In this way, trade unions may have helped reproduce the discursive conditions which produce privatisation.

Bright spots are evident, nonetheless, in our data. Trade unions are strong and active, which is an important precondition of effective resistance to privatisation. The inter-relatedness of the Caribbean region means that successful strategies in this respect may travel more easily. A number of partners including the Global Partnership for Education have the disposition and funding to facilitate change, though clearly the agenda of supra-national organisations such as the IMF aligns more with the reproduction than disruption of privatising trends.

## Recommendations

### ***We recommend that policymakers:***

1. Take more seriously the provisions in their statutory and other national statements concerning the purposes of education and take steps to ensure that economically oriented objectives do not supersede more holistic ones in practice. Where purposes are framed almost or wholly economically, we recommend that policymakers take inspiration from other regional statements, for example, Antigua and Barbuda's educational purposes, as set out in its 2008 Education Act.
2. Prioritise the funding of public education such that supplementary private funding is not required. Emphasis on ActionAid's 4 Ss of public education funding (Share, Size, Sensitivity and Scrutiny) is instructive in this regard (Ethiopia Study, 2021). For the Caribbean, ensuring that education sector plans prioritise investing in the teaching workforce and cater to the most vulnerable children demonstrate commitment to and greater likelihood of improving education quality for the most critical beneficiaries of education funding (Education Commission, 2019; Ethiopia Study, 2021; WDR, 2018).
3. Create a policy narrative that centres on and foregrounds education as a public good, and challenges the ways in which this notion has been problematised (Daviet, 2016). While it may be quite alluring within a neoliberal climate for governments to shift from delivering education services directly to functioning as "contractor, monitor and evaluator of services provided by a range of providers" (Ball & Youdell, 2007, p. 59), they are encouraged to not lose sight of their responsibility to: (1) protect the rights of all learners to quality education and (2) ensure that education contributes to personal development, social cohesion, as well as economic development that benefits all citizens.
4. Engage with research that highlights the limitations of privatisation as a means of enhancing public services (e.g. Lubienski, 2003). Education sector planning informed by such evidence assists in bolstering public education against the negative effects of education privatisation, such as increasing inequalities and inequity created by education markets.

5. Cease selection to enter secondary-school level (where this happens) and make all secondary schools non-selective. End the implicit (as well as explicit) hierarchisation of secondary provision.
6. Regulate private-sector involvement in public education so as to ensure equitable access to education that fulfils the rights of all Caribbean children and young people/students. A tax on profits generated by private companies from contracts with the public education sector could be invested back into education, for instance in achieving the United Nations' (2021) sustainable development goals (SDG) for education. If left unregulated, public education may become susceptible to unscrupulous private sector schemes that at the onset may appear beneficial, but in the end result in little or no educational improvement or, in the worse case, a trail of destruction as was the case with "leaseback" agreements or public-private partnerships (PPP) in Canada (LaRocque, 2008) and in Belgium (DeRynck, 2005 cited in Verger et al., 2016) and the voucher system in Chile (Carnoy & McEwan, 2003).
7. End the use of temporary teaching contracts where the role is permanent.
8. Ensure all teachers are professionally qualified.

***We recommend that teachers' unions:***

1. Increase awareness of endogenous forms of education privatisation in particular and their effects so that their membership in turn can be better informed and more strongly represented.
2. Deploy existing positive images and political narratives of teachers, education systems and educational leadership that are predicated on education as a public good in campaigns, so that teachers can visualise an alternative to privatisation.
3. Create and use "public-education champions" in each school to articulate amongst teachers the impact on public-ness of a given policy, local or national and to suggest alternatives or amendments.
4. Work in partnerships with other like-minded organisations to amplify counter-arguments to privatisation and enhance the potential for impact.

***We recommend that future researchers:***

1. Conduct cross-regional surveys in the Caribbean that enable comparisons between nation states, education phases and

schools in different socio-economic contexts that can contribute to enhanced strategic education sector analysis and planning for the region. Investigate further the exploratory findings emerging from this report by seeking a broader sample group.

2. Explore the 'who' of privatisation; this research suggests that key actors in privatisation may not resemble those found in other contexts, and so a comprehensive mapping is required.
3. Use qualitative approaches to generate a deeper perspective on the embeddedness of dispositions favourable or antagonistic to privatisation in key stakeholder groups.

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# Appendices

## Appendix One: The features of education privatisation used in our survey

Features are adapted from Winchip et al. (2019). The brief discussion is ours.

L = Leaders' survey      P = Parents' survey      T = Teachers' survey

- 1**      You are responsible for your school's budget (L)  
The decentralisation of the management of school budgets is an indicator of privatisation because provision cannot be privatised if it retains important structural dependencies such as for budgeting on the local authority, or district.
- 2**      Your funding is based on a voucher system (L; P)  
Vouchers are an indicator of privatisation because they formalise education as a 'producer-consumer' relationship and enable public money to subsidise (quasi) private provision (see Carrasco and Gunter, 2019).
- 3**      Your school can gain additional funding through competitively awarded government funds (L)  
This indicates privatisation because it normalises both the under-funding of public schooling and the development of an entrepreneurial disposition in school leaders.
- 4**      Pupil enrolment is based on parent choice (L; P; T)  
This indicates privatisation because parent choice operationalises market principles in education. The differential capacity of parents to choose has implications for equity; in other words, those with more cultural and economic capital are able and disposed to make choices which reproduce that capital.

- |          |  |
|----------|--|
| <b>5</b> | <p>Parents pay additional fees for essential items (e.g., textbooks, paper, pens) (L; P; T)</p> <p>This indicates privatisation because it normalises the under-funding of public education.</p>   |
| <b>6</b> | <p>Parents pay additional fees for extra-curricular activities (L; P; T)</p> <p>This indicates privatisation because it normalises the under-funding of public education.</p>  |
| <b>7</b> | <p>Your school competes with private schools (L; T)</p> <p>This indicates privatisation because competition between schools operationalises market principles in education.</p>  |
| <b>8</b> | <p>Your school is ranked nationally in league tables of school performance (L; T)</p> <p>This indicates privatisation because school rankings are part of the information landscape upon which parents are intended to draw in order to inform their choice of school, which operationalises a market in education.</p>  |
| <b>9</b> | <p>Standardised testing of pupils is used to evaluate teacher performance (L; T)</p> <p>This indicates privatisation because pupils' test scores underpin the ranking, the implications of which are set out in #8 above. Linking these scores to teacher performance reduces constructions of education to a corporatised process of measurable inputs (teaching) and outputs (test scores), whose relationship is linear and causal. There is no evidence that this is true. Implications for teacher equity include the fact that those teaching pupils who are likely to perform well in tests (e.g. those whose parents can afford private tutoring and those without learning disabilities) are constructed as more effective.</p> |



- 10** Your institution uses marketing strategies to attract students (L)  
This indicates privatisation because it assumes that attracting students is beneficial for the school's survival, perhaps because funding is linked to recruitment. It further encourages school leaders to see themselves as marketers of a product—which is endogenous privatisation—rather than as professionals engaged in public-services education.
- 11** Personnel/HR decisions are devolved to the school level (L)  
This indicates privatisation because provision cannot be privatised if it retains important structural dependencies such as for personnel and HR on the local authority, or district.
- 12** Employment conditions unrelated to pay are determined at the school level (e.g. hours) (L; T)  
This indicates privatisation because it constructs key elements of public schooling as matters that should not be debated and agreed in a public, political forum, but rather are matters that may be handled locally, often with reduced transparency and for diverse motives. One such motive is to bring about increased 'efficiency', which is not an educational imperative, and which may have negative implications for teacher equity between institutions.
- 13** Teachers can be hired on temporary contracts (L; T)  
This indicates privatisation because insecure, precarious employment is constructed as agile strategising within a competitive marketplace, where budgetary imperatives are prioritised over educational ones.
- 14** Teachers' salaries are negotiated individually (L; T)  
This indicates privatisation because it makes pay a private matter between the school administration and teacher, rather than a public one that is agreed through collective bargaining.

- 15** Teachers' salary scales are determined at school level (L; T)  
This indicates privatisation because it is part of a suite of measures that differentiate schools, producing advantage in a marketplace of provision.
- 16** Teachers must undergo an annual performance management review (L; T)  
This indicates privatisation because it is a practice that was imported from the business sector under New Public Management. It replaced a system of mutual accountability understood through the lens of professionalism.
- 17** Teachers' salaries are linked to their individual performance (L; T)  
This indicates privatisation because it tends to link performance to outcomes in pupils' test and exam scores, which is a problematic, private-sector-derived assumption. It also makes pay a private matter between the school administration and teacher, rather than a public one that is agreed through collective bargaining. Third, the assessment of teachers' performance is susceptible to capture by private-sector-inspired attitudes concerning what counts as high quality (see Courtney and Gunter, 2015).
- 18** Teachers' salaries are linked to their students' test/exam scores (L; T)  
This indicates privatisation because linking performance to outcomes in pupils' test and exam scores is a problematic, private-sector-derived assumption. It is part of a suite of measures that seek to produce a disciplined, efficient workforce, producing advantage in a marketplace of provision. It assumes that teaching is not a vocation, but rather a job like most others, for which workers require financial incentivisation.

- 19** All your teachers have a professional qualification (L; P)  
Deregulating teacher qualification requirements indicates privatisation because it is part of a suite of measures that reduces teaching from a profession that requires education to a craft that requires training, or practice. Teachers in this latter model are cheaper, and so contribute to a more efficient school (conceptualised as a business). Educational considerations are deprioritised.
- 20** Teachers may have to teach outside their specialism (e.g. age group or subject) (L; P; T)  
This indicates privatisation because it downplays the teacher's expertise, which is necessarily focused. It therefore reproduces the issues discussed above in #19.
- 21** Your institution leads or would lead initial teacher training (rather than a HEI) (L; T)  
This indicates privatisation because when schools lead ITT, it constructs teaching as a craft rather than as a profession located in the field of education as a social science, and produces the issues discussed above in #19.
- 22** Non-teaching services are contracted out to private providers (L)  
This indicates explicit exogenous privatisation.
- 23** The private sector funds capital projects in your school (e.g. new buildings) (L)  
This indicates explicit exogenous privatisation.
- 24** The private sector provides professional development to teachers (L; T)  
This indicates explicit exogenous privatisation.
- 25** The private sector provides consultancy to you/your school (L)  
This indicates explicit exogenous privatisation.

- 26** | The private sector provides school-inspection services (L)  
This indicates explicit exogenous privatisation.
- 27** | Parents pay for private tuition to supplement schooling (P)  
This indicates explicit exogenous privatisation. There are multiple consequences for equity, including that only wealthier parents can afford this tuition, meaning that desirable schools become filled with their children. This reproduces class advantage.

## **Appendix Two: IMF interventions in ten Caribbean countries**

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### ***Antigua and Barbuda.***

Key extracts from the press release: ‘Executive Directors [from the IMF] ... encouraged the authorities to adopt a comprehensive medium term fiscal consolidation program beginning with the upcoming 2015 budget... They also recommended measures to reduce the wage bill, and cut transfers to state owned enterprises... Lower labour costs ... would also help enhance productivity.’

Source: Adapted from 2014 Article IV consultation. Retrieved from <https://www.imf.org/en/Publications/CR/Issues/2016/12/31/Antigua-and-Barbuda-Staff-Report-for-the-2014-Article-IV-Consultation-and-Second-Post-43087> Subsequent consultations have not been released to the public.

### ***Barbados***

Key extract from the press release: ‘The Barbadian authorities continue to make good progress in implementing the comprehensive Economic Recovery and Transformation (BERT) plan aimed at restoring fiscal and debt sustainability, rebuilding reserves and increasing growth... The completion of a domestic debt restructuring in November 2018 has been very helpful in reducing economic uncertainty’.

Source: 2019 Article IV consultation. Retrieved from <https://www.imf.org/en/Publications/CR/Issues/2019/12/18/Barbados-2019-Article-IV-Consultation-Second-Review-Under-the-Extended-Arrangement-Request-48886>

## ***Belize***

Key extracts from the press release: ‘Executive Directors noted that the pandemic has hit Belize hard ... [and so] highlighted the urgency of restoring debt sustainability ... and implementing structural reforms to boost growth and enhance resilience... Directors emphasised that growth-enhancing structural reforms would support public debt reduction.’

Source: 2021 Article IV consultation. Retrieved from <https://www.imf.org/en/Publications/CR/Issues/2021/06/07/Belize-2021-Article-IV-Consultation-Press-Release-Staff-Report-and-Statement-by-the-50198>

## ***Grenada***

Key extracts from the press release: ‘Executive Directors ... highlighted the need to enhance the business climate and competitiveness, including through improvements in labour market institutions. They noted that education and training programs to match job opportunities with the labour force are also needed... They stressed the importance of implementing the public-sector management reform strategy to improve public sector productivity and service delivery.’

Source: 2019 Article IV consultation. Retrieved from <https://www.imf.org/en/Publications/CR/Issues/2019/07/01/Grenada-2019-Article-IV-Consultation-Press-Release-Staff-Report-and-Statement-by-the-47060>

## ***Guyana***

Key extracts from the press release: ‘Directors welcomed the authorities’ Natural Resource Fund (NRF) legislation for managing Guyana’s oil wealth and emphasised the need to complement it with a fiscal responsibility framework to avoid fiscal deficits.’

Source: 2019 Article IV consultation. Retrieved from <https://www.imf.org/en/Publications/CR/Issues/2019/09/16/Guyana-2019-Article-IV-Consultation-Press-Release-Staff-Report-and-Statement-by-the-48678>

## ***Jamaica***

Key extract from the press release: The economic reform program, that began in May 2013, has been a turning point for Jamaica. With broad-based social and political support for reforms, the Jamaican government—over two administrations—has embarked on a path of fiscal discipline, monetary and financial sector reforms, and wide-ranging structural improvements to break a decades-long cycle of high

debt and low growth ... Continued reform implementation will not only safeguard hard-won gains but also deliver stronger growth and job creation.'

Source: 2018 Article IV consultation. Retrieved from <https://www.imf.org/en/Publications/CR/Issues/2018/04/16/Jamaica-2018-Article-IV-Consultation-Third-Review-Under-the-Stand-By-Arrangement-and-Request-45801>

### ***Saint Kitts and Nevis***

Key extract from the press release: 'Directors encouraged structural reforms that raise productivity growth, economic competitiveness, and human capital. In this regard, they particularly welcomed the authorities' agenda to diversify energy sources and channel CBI revenues into other sectors besides tourism and for infrastructure that protects against natural disasters.'

Source: 2021 Article IV consultation. Retrieved from <https://www.imf.org/en/Publications/CR/Issues/2021/10/28/St-Kitts-and-Nevis-2021-Article-IV-Consultation-Press-Release-Staff-Report-and-Statement-by-500804>

### ***Saint Lucia***

Key extracts from the press release: 'Fiscal policies should be geared toward rebuilding policy space and ensuring public debt converges to the regional target of 60 percent of GDP by 2030... and limiting current spending growth (particularly the public wage bill) ... Enhancing productivity will require a better alignment of the education system with labor market needs.'

Source: 2020 Article IV consultation. Retrieved from <https://www.imf.org/en/Publications/CR/Issues/2020/02/24/St-49070>

### ***Saint Vincent and the Grenadines***

Key extracts from the press release: 'Directors stressed the importance of advancing structural reforms to raise longer-term growth ... [and] recommended vigorously implementing policies to foster private sector activity.'

Source: 2019 Article IV consultation. Retrieved from <https://www.imf.org/en/Publications/CR/Issues/2019/02/25/St-Vincent-and-the-Grenadines-2018-Article-IV-Consultation-Press-Release-Staff-Report-and-46628>

### ***Trinidad and Tobago***

Key extracts from the press release: 'Good progress has been made in fiscal consolidation through spending cuts, but public debt [has] continued to rise...A multi-pronged strategy is needed to ensure a sustained recovery, and safeguard fiscal and external sustainability.'

Source: 2018 Article IV consultation. Retrieved from <https://www.imf.org/en/Publications/CR/Issues/2018/09/25/Trinidad-and-Tobago-2018-Article-IV-Consultation-Press-Release-and-Staff-Report-46267>







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# Time to Turn the Tide Privatisation Trends in Education in the Caribbean



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