



Prachi Srivastava

Associate Professor
School of International Development and Global Studies
University of Ottawa
prachi.srivastava@uottawa.ca
Twitter: @PrachiSrivastava

The Second Wave of the Low-fee Private Sector: corporate-backed chains in the Global South*

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ABSTRACT

This paper examines the institutional evolution (DiMaggio & Powell, 1983; North, 1990) of the low-fee private sector in parts of the Global South as an attractive sector for corporate business. The entry of 'big' corporate capital, domestic and international, and the emergence of an ecosystem of allied service providers for this sector (e.g. education microfinance institutions, rating systems, scripted curriculum delivery systems, education technology providers, etc.), many of which are also corporate-backed or run, are markers of institutional evolution of the sector. Though the scale and reach of the sector is not as grand as corporate operators purport, the 'second wave' is entrenched in increased corporate engagement, business practice, and commercialisation. And this warrants serious attention.

The second wave sees a shift from 'one-off mom-and-pop teaching shops' in schooling micro-ecosystems (e.g. individual villages, slums, urban neighbourhoods), to their coexistence with corporate-backed school chains operating as part of a micro-system within themselves. They span geographical boundaries beyond the local (e.g. across districts, cities, and countries), and are supported by allied service providers.

1. The LFP Sector: The Second-Wave

In view of generally accepted claims of poor state sector quality in many countries of the Global South, the low-fee private sector has often been posited as 'the poor's best chance' (Tooley 2000) against broader concerns of the state's fundamental duty to provide basic education to all (Watkins 2004). The initial emergence of the low-fee private sector and its subsequent evolution

into an attractive sector for business backed by domestic and international corporate investment holds an important and divisive place as we enter the post-2015 era in global education.

As I have discussed elsewhere (Srivastava 2013), at the beginning of the international Education for All (EFA) movement, the emergence of the low-fee private sector was dismissed in high-level policy circles, and by academics and right to education advocates as an atomized phenomenon, fragmented and insufficient in scope to warrant concerted study. This was in view of more pressing EFA goals to ensure, quite rightly, that all children are able to access free basic education. However, what first seemed like small, disconnected, individual schools ‘mushrooming’ in specific contexts where there was little or poor quality state provision, has taken root as a phenomenon, purportedly of scale, backed by corporate actors, particularly in some parts of Sub-Saharan Africa and Asia.

This has attracted widespread attention as part of a broader trend of privatization of and in education, and quite unlike dismissals of the past, has reached the highest levels of global education policy-makers, influencers, and advocates. For example, the UNESCO Education for All Global Monitoring Report began including a section on low-fee private schooling since the 2009 report. Global civil society actors such as the Right to Education Project, the Soros Open Society Foundations, and the Global Initiative for Economic, Social and Cultural Rights have been spurred into developing a human rights framework for private sector engagement in education. The most vehement criticism has come from the United Nations Special Rapporteur on the Right to Education who has referred to the existence of corporate-backed schools and providers in education as being indicative of ‘abusive practices’ (United Nations 2014) of the private sector, calling on states to sanction them:

89. By definition, business is profit-oriented. Education is all the more attractive since it denotes a certain respectability, which can be projected to disguise business interests, fraudulent practices and corruption [...]

90. As regulators, States must sanction abusive practices by private education establishments
(United Nations, 2014)

Given the earlier dismissive response of the academic and global policy community, the urgency expressed to examine the potential centrality of the sector as inimical to equitable access to education for all in just a decade, is remarkable. In essence, we are entering a ‘second-wave’ in our understandings and analyses of the low-fee private sector; as is the sector, of its evolution. I argue that the second wave sees a shift from ‘one-off mom-and-pop teaching shops’ in schooling micro-ecosystems (individual villages, slum communities, and urban neighbourhoods), to their coexistence with corporate-backed school chains and service providers. These chains operate as part of a micro-system within themselves across geographical boundaries beyond the local (across districts, cities, regions, and countries).

The entry of ‘big’ corporate capital, both domestic and international, and the emergence of an ecosystem of allied service providers for this sector (education microfinance institutions; rating systems; scripted curriculum delivery systems; education technology providers (low- and high-tech, etc.)), many of which are also corporate-backed or run, are markers of institutional evolution (DiMaggio & Powell 1983). Thus, though the scale and reach of the low-fee private sector may not

be as grand and wide as the operators purport, the second wave is strongly entrenched within increased corporate engagement, business practice, and commercialization. And this warrants serious attention.

The second wave seems comprised of at least three intertwining and enabling trends, resulting in the emergence of corporate-backed low-fee private school chains and service providers in the Global South.

1. Mobilizing discourse and filtering evidence — in particular, morphing the metaphor of the market to illogical consequence
2. The opening up of domestic formal education spaces through state-sanctioned public-private partnership (PPP) arrangements, and framing mental models accepting of the discourse of ‘partnership’
3. Increasingly opaque, intertwined, and complex sets of ‘new/non-traditional’ non-state private actors operating in education in the Global South, with direct or arm’s length corporate connections that operate by blurring the lines between ‘doing business’, profit-making, and ‘doing good’ (Olmedo 2013)

These arguments are posited against three caveats. Firstly, claims of ‘scale’ purported by the corporate-backed low-fee private sector should not be taken at face value. In fact, when we examine the reach and numbers of some of the most publicized chains, we find the total numbers to be miniscule as a proportion of state provision.

Secondly, the corporate-backed low-fee private sector does not operate equally across all areas of the Global South. As a concerted business venture with desired results on investment, we see the emergence of this second wave primarily in lower-middle/middle-income countries with significant ‘buzz’ around the engine of economic growth. India, with its relatively stable political climate and as one of the top five largest world economies, is a favoured location.

Finally, the act of ‘doing good’ may be broadly termed ‘philanthropic’, but is of a nature quite different from traditional non-profit grant-making philanthropies in the ‘business of charity’. Many of the non-state actors (venture philanthropies, social entrepreneurship firms, corporate social responsibility units, etc.) involved with the diffusion of corporate-backed low-fee private school chains and their allied service providers operate with mental models framed by and the modalities of the ‘business of making money’ with an added offshoot of ‘doing good’. This is similar to Ball and Olmedo’s (2011) characterization of ‘creative capitalism’, or ‘an approach where governments, businesses, and non-profits work together to stretch the reach of market forces so that more people can make a profit, or gain recognition, doing work that eases the world’s inequities’ (Microsoft 2008 qtd. in Ball & Olmedo 2011: 84).

2. Morphing the Metaphor of the Market and Filtering Evidence

The emergence of the second wave of the evolution of the low-fee private sector and its research is linked to strong enabling discourse that ‘morphs’ (Cowen 2009) the metaphor of the market and filters evidence. A number of recent reviews raise queries about the low-fee private sector, and point to inconclusive evidence on relative achievement, inputs, and affordability (see Day et al. 2014; Mcloughlin 2013; Srivastava 2013). Overlooked work includes that of influential low-fee

private sector advocate and investor, James Tooley, and his colleagues' own scholarly and refereed published research which is technical in tone and, when closely read, reveals important nuances.

On relative achievement, their work in Kenya and India showed that private school students did not universally achieve better results in every subject, taking account of background variables (Dixon et al. 2013; Tooley et al. 2010). On equity concerns, their work in Nigeria and India showed that the most disadvantaged, described as orphans, migrants, and financially unstable families, could not afford the 'low' fees charged (Tooley & Dixon 2005b). Finally, their work revealed education corruption at the highest levels, showing that such schools in India gained recognition through bribery (Tooley & Dixon 2005a). These findings are similar to results of other studies in contexts including Ghana, India, Nigeria, Malawi, and Pakistan, among others (Akaguri 2011; Chudgar & Quin 2012; Fennell & Malik 2012; Härmä 2009; 2011; Ohara 2013; Rose 2005; Rose & Adelabu 2007; Srivastava 2007; 2008).

Despite much contrary research evidence, including that from his own work, Tooley's 'catchy' journalistic commentary, grey and informal reports, and book on his 'personal journey' into the 'education of the poor' (Tooley 2009) have been highly publicized. This work has caught the attention of high-level policy circles and networks of non-state private actors. Nambissan and Ball's (2010) detailed analysis suggests that this is a result of Tooley and his network's 'policy entrepreneurship' '*par excellence*' on school choice and the low-fee private sector in deep and far-reaching transnational networks.

Recommendations include establishing public and private voucher schemes, education service companies for school improvement and accreditation, education microcredit/loan companies, and 'the liberalization of the regulatory environment regarding private...schools making a surplus' (Tooley & Dixon 2003: 22), acknowledging that this may, in fact, be illegal. These have inspired many second-wave low-fee private sector players to act. Examples referring to Tooley's work in particular, include India's Centre for Civil Society advocating state-subsidized vouchers to access low-fee private schools; Gray Matters India creating a school performance system for 'affordable private schools'; co-founder of Omega Schools, Ken Donkoh to start a chain in Ghana (eventually in collaboration with Tooley); and IDP Foundation's Rising Schools Program, a micro-credit initiative for the sector in Ghana.

The decided enthusiasm about the low-fee sector is not based in sentiment alone. It is imbibed with the motivation to actively create a global market for the corporate-backed low-fee private sector. This is helped by extending the metaphor of the market and the reach of its 'Three Musketeers' — branding, competition, and profit: 'Assisting the market in the creation of educational brand names...is another possible area for outside action—for philanthropy, investment, and aid if required to satisfy investors of the viability of the market' (Tooley 2009: 260).

The potential for investors to capitalize on establishing branded chains and services to the sector, with a focus on replication and standardization, is key. Tooley asserts, 'school chains with names such as EasyLearn or Virgin Opportunity could be as reliable as, say, Sainsbury's [supermarkets] or Boots [pharmacies]' (Wilby 2013). Bridge International Academies, purportedly the world's largest chain of low-fee nursery and primary schools, bills itself as 'the Starbucks' of schools in developing countries (Olopade 2013).

In this idealized market, ‘competition would be a chief spur’ (Tooley 2009: 261). Unbranded or unchained schools ‘could suffer or go out of business’ (Tooley 2009: 261), or others could ‘soon enter the market establishing competing brand names’ (261). There is little consideration for what would happen to children in instances where they are attending schools that close and others do not step in to fill the gap.

The profitability of low-fee private schools even as relatively small, single operations by individuals without the backing of ‘big’ capital, was noted early on: ‘running a school even for low-income families was potentially a profitable undertaking, with estimated profits of about 25% in the year of [school] recognition’ (Tooley & Dixon 2003: 19). The profitability of scaling-up the sector did not go unnoticed. In 2012, Pearson, owner of the Financial Times, and the world’s largest educational publisher, launched the Pearson Affordable Learning Fund (PALF), a \$15 million fund to invest in the low-fee private sector across Asia and Africa (Tran 2012). PALF has quite possibly, and with speed, become the most influential player in supporting the scaling-up of the corporate-backed low-fee private sector. ‘In January 2015 we [PALF] announced Pearson will invest a further \$50 million over the next 3 years’ (PALF 2015). Michael Barber, PALF’s Chief Education Advisor, and reportedly ‘an old friend’ of Tooley’s (Wilby 2013), stated in an interview on BBC HardTalk: ‘It’s *absolutely for profit*. But get this right—it’s important to demonstrate profit because we want other investors to come in’ (Barber qtd. in Riep 2014: 264; emphasis added). As Riep (2014) notes, demonstrating profitability is key to attracting investment in the early attempts to create a market in this sector.

For those with interests in the corporate-backed low-fee sector and for advocates of increased private provision, the impetus to draw big capital into the fold is a welcome development. Acknowledged state sector dysfunctions in many countries are proposed as the impetus to expand the low-fee private sector, rather than actively injecting capital to improve the state sector. For example, Michael Barber asserts: ‘The question every education leader needs to answer is: “How do we get every child in this district, city, state, province or country a good education as soon as possible?” Low-cost private education is an important part of the answer, in almost every country in the developing world’ (PALF 2015).

However, the current discourse framing the development of the low-fee private sector morphs the metaphor of the market to such degree that there is little consideration of whether the claim to a fundamental right and the provision of a social good to the economically and socially disadvantaged are really comparable to middle-class supermarkets, pharmacies, and coffee shops. Even Milton Friedman, the revered champion of the marketization of education, conceded the role of the state in ensuring basic education for all. He noted two peculiarities of education as a good, which add to the complications of treating markets in education as pure competitive markets.

The first was related to what he termed, ‘neighbourhood effects’. These are ‘circumstances under which the action of one individual imposes significant costs on other individuals for which it is not feasible to make him[/her] compensate them, or yields significant gains to other individuals for which it is not feasible to make them compensate him [/her]’ (Friedman 1962: 85-86). In other words, education has social consequences beyond the individual. The effect, for example, of choices made by one group of parents at a specific point in time that lead to school closures can

have resounding effects for other children in the present, and for future children. This can lead to deleterious effects on society.

The second was termed as the 'paternalistic concern for children and other irresponsible individuals' (Friedman 1962: 86). There is the need for the state to be involved in education (particularly in developing countries) where schooling may not be universal, making it compulsory to some minimal level, and enforcing that compulsion to uphold children's right to education. In addition, there may be equity concerns regarding mechanisms that disproportionately benefit relatively advantaged groups.

Nonetheless, the corporate-backed expansion of the second-wave of the low-fee private sector, sometimes with the financial support of bilateral agencies and multilateral development banks exists (e.g, Bridge International Academies). This is despite inconclusive evidence and amidst calls against profiteering and, in certain cases, is in contravention of legal frameworks. Bridge International Academies, which receives funding from the UK Department for International Development (DFID), the International Finance Corporation (IFC), and the CDC (the UK's development finance institution), openly admits it: 'Technically, we're breaking the law', as stated by Chief Strategy Officer Shannon May in an interview with the Times Education Supplement (Exley 2013).

The primary strategy for keeping costs 'low' across the sector is the common practice of hiring teachers at below the minimum wage in some instances, or in most cases, certainly below the teacher's state salary scale (India, Pakistan, Ghana, Nigeria, etc.). This is against labour laws. There are laws against the commercialization of schools and running schools for a profit (India). There are additional concerns that such operators may receive undue taxation benefit and in the acquisition of land at much below market rates in certain contexts (Pakistan; India). Despite this, the scaling-up of the corporate-backed sector is enabled by the tacit and willing involvement of government and international agencies through the mental models and modalities of partnership.

3. Scaling-up (?)

As is apparent from the discussion thus far, evidence of initiatives on the second wave of the sector is nascent. Available information is fragmented and opaque, and concentrated in a small range of countries in the Global South, and on a relatively small number of actors. This makes it difficult to map the evolution of the sector, its size, and to draw broad conclusions. Nonetheless, a few notable examples are presented here. For the purposes of this discussion, and given its influence, we focus on PALF, specifically on its portfolio of education chains (Table 1).

Table 1 Pearson Affordable Learning Fund (PALF) Portfolio of Chains

	Country	Sector	Stated Scale	Published Fees	Estimated Fees as Proportion of Min Wage/ Unskilled Wage*	Organizational Links ⁺	Type of Linked Actor ⁺
APEC Schools	Philippines	Secondary	13 schools ^x	Grade 7: P 24,850/yr Grade 8: P 25,350/yr Grades 9-12: N/A	Grade 7 & 8: 15% Grades 9-12: N/A but likely higher	<ul style="list-style-type: none"> • Ayala Corporation • PALF 	Corporate group (holding company)
Avanti Learning Centres	India	Secondary private tuition	12 centres [5 stand-alone centres; 7 in-school centres (Chennai and Tibetan schools)]	Unclear	N/A	<ul style="list-style-type: none"> • Echoing Green • Draper Richards Foundation • Pan IIT Alumni • UnLtd India • PALF • Personal investors 	-Social enterprise/ -impact investment -Not-for-profit -Personal investors
Bridge International Academies	Kenya (Uganda, Nigeria for expansion)	Elementary	359 schools; +100,000 students	~\$5/month	8% (As proportion of stated target group: families living on maximum \$2/day)	<ul style="list-style-type: none"> • Bill Gates • CDC • DFID • IFC • Khosla Ventures • Learn Capital • NEA • Novastar • Omidyar Network • PanAfrican Investment Co. • Rethink Education • PALF 	-Venture capital and private investment firms -Bilateral aid agency -Bilateral donor bank -Personal investors
Lekki Peninsula Affordable Schools	Nigeria	Elementary	N/A	N/A	N/A	<ul style="list-style-type: none"> • Unclear • PALF 	Unclear
Omega Schools	Ghana	Elementary	38 schools; 20,000 students	~\$0.65/day	41%	<ul style="list-style-type: none"> • Personal investors • PALF 	-Personal investors
Spark Schools	South Africa	Elementary	5 schools (+ 1 for expansion)	R 17,955/yr	62%	<ul style="list-style-type: none"> • eAdvance • ISASA • PALF 	-Education management company -Private schools association
Sudiksha Knowledge Solutions	India	Pre-school	23 pre-schools	N/A	N/A	<ul style="list-style-type: none"> • ~Unclear (Franchise model) • PALF 	-Private investors

Source: All data extracted from PALF and organizational websites. Last verified March 2015.

Note: * Calculated in the currency used by the provider. Latest lowest wage rates were used. South Africa (farming and agriculture, March 1 2014-29 February 2015); Philippines (mean of four groups, 2015); Ghana (local daily wage rate, 1 May 2014- 30 May 2015); Kenya (lowest wage 2014-2015). Monthly rate calculated on 30 working days, and on the basis of one full-time adult worker.

+The organizational links may not be exhaustive, as not all data may be publicly available. Some websites were more developed than others.

X: A news report states that APEC plans to expand by adding 11 new schools by the end of 2015.

According to Pearson's earlier website, it 'makes minority equity investments in for profit companies to meet a growing demand for affordable education services' (Pearson PLC 2012: para 1). As mentioned above, as of January 2015, Pearson announced a further \$50 million investment in addition to its initial \$12 million over the next three years. According to PALF, 'This is a testament to Pearson's commitment to educate children in the developing world and brings our total assets under management to \$80 m[illion].'

PALF has a portfolio of 10 investments in what it calls 'affordable education services', more specifically, in chains and ancillary service providers. Of these, six are school chains from pre-school to secondary, and one is a chain of private tuition centres focusing on secondary school exam preparation. The remaining three are investments in education technology and learning materials. Geographically, four of the investments are in India, and the rest are spread out in Ghana, Kenya, Nigeria, Philippines, South Africa, and Tanzania. Crucially, what constitutes 'affordable learning' for PALF is neither precisely defined, nor consistently applied, as a cursory look at the fees charged by its chain operators reveals.

Of these, Omega Schools and Bridge Academies International are best known. In 2008, while a student, Ken Donkoh, a native of Ghana, and previously an employee of the World Bank and IFC approached Tooley with a business plan (Riep 2014). As relayed by Donkoh and Tooley to me in personal communications, Omega started with the investment of personal capital, until PALF took a stake in Omega Schools in 2013. This allowed the chain to expand to 38 schools and reportedly to 20,000 students. In 2013, Tooley predicted 100 schools with 50,000 students by 2014 (Wilby 2013). This does not seem to have materialized at the time of writing, and may point to the potential limits of scalability.

As of June 2012, Pearson is reported to have invested in Bridge. Its 'Academy-in-a-Box' approach is marketed as having 're-engineered the entire lifecycle of basic education, leveraging data, technology, and scale' to keep quality up and prices low (Bridge International Academies 2013a). From its first academy in 2009 in Kenya, Bridge had 359 schools in 2014, and plans to expand to Uganda and Nigeria in 2015. According to the Omidyar Network, one of its investors, Bridge plans to operate in at least 12 countries across Sub-Saharan African and India, and have more than 10 million students by 2023 (Omidyar Network n.d.).

Though it is premature to make definitive claims based on available information, we can, nonetheless make a number of initial observations. Firstly, it is clear that chain operators are linked to a number of various kinds of actors, included an expanded array of new/non-traditional non-state private actors, sometimes alongside government, not-for-profit, and aid agencies in complex arrangements. The relationship between the actors is opaque, their roles, and their influence on the chain operator is unclear. In many instances they are sets of investors, but not always (SPARK schools). While Bridge, the largest operator, also has the largest and most diversified sources of funding, this is not true of Omega, the second largest. Much more concerted analysis is required to make sense of the links, and to ascertain whether or to what degree each operator would be part of a network.

Secondly, claims of scale are over-zealous. It is unclear if this is a marketing ploy by chain operators to inspire confidence in attracting PALF and other investors; mobilizing discourse by PALF to gain global legitimacy; or plain naiveté and misplaced optimism. Simple observation reveals that with the exception of Bridge, the actual number of schools/centres for each operator is quite small. They constitute a minuscule proportion of total provision in these countries, as well as a minuscule proportion of public provision. Simple calculations would reveal these to be much below one percent. Even in Bridge's case, coverage would constitute approximately 1.8 percent as a proportion of public provision in Kenya with 19,397 public primary schools, and less if this included the total number of primary schools.

Thirdly, published fee rates were difficult to obtain publicly. Only APEC, Bridge, Omega, and SPARK published their fees. In the case of APEC, only rates for the first two years (Grade 7 and 8) were available, even though the schools run until Grade 12. Based on APEC's increasing fee structure between Grade 7 and 8 it would be reasonable to assume that this continues until the end of the cycle. Finally, other than in Omega's case, it was unclear if the fees charged represented the total out-of-pocket costs households would need to pay. SPARK provided a breakdown of tuition, stationery, and registration fees, and although uniforms and a meal plan were mentioned, costs were not available.

Finally, all operators frequently used terms such as 'affordability', 'disadvantaged', and 'bottom of the pyramid' on their promotional websites. The analysis here shows that this can be severely questioned by: (a) the paucity of information and lack of transparency on the fee structure and fee amounts; (b) any specific operationalization of what is meant by 'affordable'; and (c) estimates showing published fees as a proportion of local daily/minimum wage rates.

There is no universally agreed figure on what constitutes 'affordable' expenditure on education. Estimates here are provided as a general rule of thumb. A more detailed cost analysis with average numbers of wage-earning members in families among the bottom quintile in specific country contexts, and comparisons with costs of accessing public providers would need to be conducted. However, as the bulk of literature on household education expenditure confirms, families in the bottom quintile are highly sensitive to income and other insecurities (i.e., health, food price shocks, seasonal migration, etc.), and are unlikely to be able to access fee-paying providers for any sustained period. It would be hard to argue that Omega Schools and SPARK, in particular, whose costs amount to 41 percent and 62 percent respectively per child as a proportion of the lowest adult wage rates, would be affordable to this group, even if estimates included two full-time adult workers.

This raises serious questions about how and on what basis PALF judges affordability and invests in school chains; and further, how chain operators raise money in the name of reaching disadvantaged children in the Global South. This analysis assumes urgency where public monies in such initiatives are directly invested by bilateral agencies, or where domestic governments subsidize such providers in PPP arrangements either through their own funds or through direct budgetary support via official development assistance. We must seriously question whether the expanded array of new/non-traditional non-state private actors in complex arrangements with non-profit, government, and international donors facilitated by PPP arrangements can lend itself to the potential capture of those spaces by actors engaged in creative capitalism (Ball & Olmedo, 2011) who are in the 'business of making money', without necessarily doing the 'good' they purport.

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