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## EDITED BY

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University of Crete, Greece  
Georgia Dimari,  
University of Crete, Greece

## \*CORRESPONDENCE

Tien-hui Chiang

✉ thchiang2453666@gmail.com

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# Lifelong learning as a governing technique of subjectivation from the perspective of the discourse of hope and fear

Tien-hui Chiang<sup>1\*</sup>, Allen Thurston<sup>2</sup> and Alison MacKenzie<sup>3</sup>

<sup>1</sup>School of Educational Science, Anhui Normal University, Wuhu, China, <sup>2</sup>School of Social Sciences, Education, and Social Work, Queen's University Belfast, Belfast, United Kingdom, <sup>3</sup>School of Social Sciences, Education, and Social Work, Faculty of Arts, Humanities, and Social Sciences, Queen's University Belfast, Belfast, United Kingdom

Neoliberal governmentality highlights that the mode of governing technologies has moved from government toward governance in modern society. Accordingly, as the self becomes the nexus between social control and self-regulation, configuring self-knowledge is mainly achieved through subjectivation, as argued by M. Foucault. The OECD's PISA program implicitly carries out this technique by holding teachers responsible for national prospects through its assumption of a close linkage between teaching quality and human capital. More importantly, PISA data facilitates international comparisons and rankings by which the international competitiveness of its participants can be identified and categorized. Unsurprisingly, those member countries/regions classified in the first tier are confident of their prospects for future economic growth in contrast with those ranked below the average, which are unable to escape from a state of fear engendered by their assumed lack of economic prospects. Teachers thus become the subject and object of educational reforms. Teachers need to improve their teaching quality through professional development to eliminate the stigma of being viewed as social burdens. The discourses of hope and fear set in motion by PISA thus turn lifelong learning into a powerful means of facilitating the government to fabricate teachers' subjectivity. This is the art of subjectivation, commanding teachers to perform as enterprising subjects who are dedicated to contributing to social progression through good teaching quality, which is perceived as the gateway for them to bring honor upon themselves.

## KEYWORDS

neoliberal governmentality, PISA, human capital discourse, the discourse of hope and fear, subjectivation

## 1 Introduction

Along with the expansion of globalization, the ideas of neoliberalism, such as deregulation, privatization, public managerialism, and devolution, have acquired a hegemonic status, impelling many countries to engage in educational reforms, focusing on efficiency (Codd et al., 1997; Chiang, 2013, 2016). This approach substantially reshapes the state's role in education, so that it is no longer concerned with social justice but with the creation of international competitiveness. This changes its nature into one of national enterprise, devoted to commercializing the educational market for capitalists (Blackmore, 2006). When the boundary between the public sector and the private sector

becomes blurred and even unnecessary, the action of commercialization evolves into an innovative philosophy, guarding the common good. While this situation is often criticized as promoting academic capitalism (Slaughter and Rhoades, 2005; Rhoades and Slaughter, 2006) or creating knowledge factories (Bok, 2003, p. 1–17), such criticisms may overemphasize social justice, and consequently neglect to correlate this situation with the interplay between neoliberalism, human capital discourse, and teacher reforms.

This oversight stimulates academics to invoke the construct of neoliberal governmentality for the purpose of exploring the character of educational reforms and their strategies. Foucault developed the notion of governmentality through analysis of German ordoliberalism and American neoliberalism (Hamann, 2009; Terry, 2012; Dean, 2018; Garrett, 2019), which commonly advocate the advantages of market freedom (Foucault, 2005; Hayek, 2007). This commonality assists researchers to apply the concept of neoliberal governmentality to investigate educational reforms in the regime of human capital discourse. Following this track, this essay explores the interaction between human capital discourse, the OECD's PISA, and teacher reforms. Its attempt is to unmask how the political intention of teacher professional development is constructed and achieved through the tactic of subjectivation, which enables the government to transform teachers into moral subjects who recognize the contribution of their competencies to national prospects (Ball, 1990; Thompson and Cook, 2014; Spohrer et al., 2018; Chiang, 2020; Popkewitz, 2022a,b). In short, the research focus of this essay is to theorize how a discourse of fear/hope is generated through the OECD's PISA and deployed as a technology of subjectivation that constitutes teachers' commitment to lifelong learning in the regime of neoliberal governmentality.

## 2 Governmentality

According to Foucault, the governing technologies in contemporary society are no longer heavily reliant on government but on governance, due to the political-economy mechanism embedded within a free market, which can induce people's rational minds and actions. As market freedom can sculpt Homo economicus, individualized atoms of self-interest or self-satisfaction, who constantly undertake self-management through rational calculations, economic man eschews the kind of social dependence that undermines social security, and thus effectively prevents society from the perverse effects of social protection, resulting from social welfare (Terry, 2012; Dean, 2018). Based on the concept of the political economy device, Foucault rightly argues that neoliberalism cannot be interpreted as a renovation of Marxist ideology or classical liberalism but as an archetype of governance (Dean, 2018), guiding the operation of state sovereignty toward a form of reflexive government, which he terms governmentality (Foucault, 2010), abandoning the use of traditional bureaucracies as the tool for accomplishing social control and taking population as the subject and object of governance. Central to this governing project is the need to optimize people's rationality, so the art of governance is to shepherd people into the realm of self-discipline, through which they become self-regulators who constantly inspect their own minds and actions.

Since consumptions or commercial activities only occur in a short time, how to prolong the utility of political economy becomes a crucial issue in terms of exercising governance. As policy arises from this need, it furnishes the government with a powerful toolkit for administering social members' lifestyles and then behaviors (Foucault, 2009). To complete this attempt, policy is often carried out through truth-telling (parrhēsia), which is able to convince the masses because it presents itself through ethics approved by them. This overture suggests that in the arena of social morality, truth-tellers are proficient in schooling, such that certain types of ideas and values are instilled into people's mindsets. That is to say, the purpose of truth-telling is to format people's self-knowledge and subjectivities, through which care of self can be stimulated to usher in self-regulation (Foucault, 2005). When care of self is governed by self-knowledge, the constitution of identity and subjectivity, it can be inferred that care of self is driven by voluntarism because the self plays out in free will, by which voluntarism can direct souls that are the portal for assimilating outside information and then developing self-conscience (Rose, 1999). Accordingly, this voluntarism unfolds a route for the realization of pastoral power or spiritual direction (Foucault, 2004; Chiang et al., 2024), so the examination of conscience or the relationship of self to self becomes attainable (Foucault, 2004, 2009, 2010; Dean, 2010). These correlations account for why the self is the proxy, integrating power and auto-regulation into an edifice, which appropriates governmentality. This is because self-knowledge carries out dual forms of social control – self-monitoring and collective surveillance. Since self-knowledge leads actors to look at themselves, self-monitoring operates automatically. Meanwhile, actors also apply their own knowledge to observe others and this situation results in collective surveillance. The combination of self-monitoring and collective surveillance turns social control into an invisible but powerful form (Foucault, 2011a).

When people's self-knowledge is reconfigured, their subjectivities, directing self-conscience and actions, are fashioned. The purpose of this process is to craft self-regulators who fulfill imposed responsibilities automatically and willingly without question. These correlations message the doctrine that self-discipline results from subjectivation, with the intention of fabricating people as manageable subjects who voluntarily comply with social instructions (Foucault, 2011b). Accordingly, it can be concluded that manufacturing the self is the prioritized assignment of governmentality (Foucault, 2011a), so subjectivation needs to be regarded as the art of governance as it installs the conduct of conduct (Dean, 2010) or the self of self (Ball, 2016) into their self-knowledge. The key point here is that subjectivation, which is often reached through reformatting people's self-knowledge in a way in which ethics is relayed, as demonstrated in the case of asceticism (Foucault, 2005), actually reconstructs people into moral subjects who are committed to self-regulation and self-improvement. As the deployment of knowledge aims to carve the subjectivities that govern people's self-conscience, central to the project of subjectivation is savior. The consistency of savior and subjectivation ensures the accomplishment of care of self, by which people act as docile bodies who unconsciously conform to social orders (Foucault, 2013). These correlations map out a big change in Foucault's theoretical trajectory, moving

from the power-knowledge formula to the knowledge-self association that highlights the advantages of governmentality. As governmentality is rooted in market freedom, it has a close relationship with neoliberalism.

### 3 Neoliberalism and human capital

The development of the world system needs to be bolstered by a value system that is certified by the public (Wallerstein, 2004); hence globalization needs a related value system. This scenario has created a huge space for neoliberalism to amplify its influence across many countries because it serves as the philosophy of a globalized system. Its founder, Hayek (2007), sophisticatedly fuses two controversial schools – Keynesianism and classical liberalism, into a single entity by reallocating governmental authority to the mechanism of a free market. However, it aims to create and sustain a free market rather than make public provisions. When such authority is determined to eliminate structural constraints of market freedom, deregulation becomes an infeasible notion, as manifested in abolishing the monopoly of state enterprises. This circumstance subscribes to the action of privatization, which is seen as a panacea for improving efficiency. Nevertheless, public units cannot be privatized totally. To need to improve the efficiency of public units remaining after privatization thus bring about the strategies of public managerialism or new managerialism. These are argued to have positive outcomes, as validated by the results of their implementation in the private sector (Chiang, 2016). Unlike Taylorism, which favors bureaucratic inspections, the principal strategy of public managerialism – devolution – appreciates trust or partnership for empowering the targeted bodies (Ball, 2003, 2004). As empowerment entrusts them with considerable autonomy, they are accountable for their decisions and outcomes. They demonstrate that they deserve this entrustment only when they demonstrate their ability through excellent results, which serve as the yardstick for measuring ability and obligation (Codd et al., 1997; Chiang, 2016). These correlations have become the rationale for performance management policy to be applied to schools and their employees (Chiang, 2020; Chiang et al., 2020, 2023).

The inclination to efficiency jeopardizes the state's role in education, which used to be one of balancing the relationship between capital accumulation and social justice (Offe, 1985). This situation pushes the state to perform as a transnational corporation (Berberoglu, 2003; Chiang, 2011) or a national enterprise (Blackmore, 2006) that demands higher education institutes behave as knowledge factories (Bok, 2003). As a result, education is commercialized, resulting in a phenomenon that can be characterized as academic capitalism (Slaughter and Rhoades, 2005; Rhoades and Slaughter, 2006). Nevertheless, these criticisms don't substantially weaken the influential state of neoliberalism because it has advanced itself into a global vocabulary, compelling many countries to conduct education reforms. This is because when efficiency is the core constitutive of the common good and social security, there is no excuse for governments not to adopt the ideas of neoliberalism into policies. Otherwise, they will be viewed as incompetent in terms of shielding social security. This implies that when efficiency benefits the public, reforms become

unavoidable. This formula intimates the principle that ethics are encapsulated within efficiency. Accordingly, neoliberalism creates a new image of the state, harboring social security in a way in which efficiency can be improved. This image, in a sense, deprives social members of their critical faculty to some extent (Chiang, 2014). Meanwhile, this obligation subscribes to the legitimacy of the state's intervention in education. That is why free market logic can liberate social members from traditional bureaucracy but simultaneously re-imprison them in the cage of centralized government (Chiang, 2011, 2014). Since the neoliberal approach focuses on efficiency, social justice or cohesion is no longer a priority on the political agenda (Chiang, 2013). More importantly, in the name of efficiency, the boundary between the public sector and the private sector used to be the gatekeeper for defending the common good, but this now becomes a structural constraint, obstructing public interests. In this context, commercial agents are nowadays seen as social enterprises (Ball and Olmedo, 2011) or creative contributors (Avelar and Ball, 2019), which are honored with the title of philanthropy because their contribution to social development becomes indispensable in the epoch of globalization (Ball, 2018). This great change espouses the combination of efficiency and creative action, in order to advance social progression by which most social members will benefit. Proclaiming outsourcing as an innovative action, it comprehensively commercializes education, resulting in the phenomenon of edu-business (Ball et al., 2017), as witnessed by the fact that a big portion of the education budget has flowed to private bodies.

Efficiency gradually pairs with human capital discourse, based on the belief that international competitiveness of a given country can be secured when the quality of human capital is uplifted. Human capital discourse consequently underpins the ideas of neoliberalism as a driving force, initiating educational reforms in many regions. Internationalization, for instance, has been defined as a shortcut for augmenting the international reputation of higher education institutes in Asia without considering their local needs (Mok, 2007). Human capital originates from the thought that national productivity can be leveled up when the quality of the labor force improves through educational investment. In this regard, education is viewed as a means by which countries may overcome the structural constraints of lack of natural resources (Becker, 1993). Under the enthusiastic guidance of the OECD, this notion unpacks into a discourse, navigating the idea that expanding higher education institutes (HEIs) is a necessary path to protect the privileged status of its member countries in the globalized world because this approach can develop more people with professional expertise. The linear relationship between globalization, international competitiveness, human capital and HEIs is thus established and becomes a global lexicon, encouraging many countries to join this expansion (Chiang et al., 2014; Meng et al., 2021), which broadens higher education policy from an elite mode to one promoting mass participation, abandoning the perspective that elite oversupply may endanger state sovereignty and replacing it with one that takes the human capital reservoir as a vehicle for social development in need (Schofer and Meyer, 2005). As this orientation has been born within the era of neoliberalism, competition endorses the indispensability of the private sector in the higher education market.

## 4 PISA, data governance, and lifelong learning

Disappointingly, the OECD failed to deliver on its promise because the explanation of higher education it encourages has not enhanced national productivity accordingly. However, this international agency has used a sophisticated strategy to resolve this crisis by creating a new global grammar, correlating teaching quality to human capital, through its PISA program. Its quantified database yields international comparisons and then international rankings that flag teaching quality in several categories, by which its member countries/regions can be placed on the league tables of international competitiveness. These tables powerfully symbolize the linkage between teaching quality and national economic prospects, thereby constructing a discourse of fear and hope (Chiang et al., 2024), which in turn leads many countries to engage in improving teaching quality through teacher reforms. More specifically, PISA participants that are classified in the first tier of such rankings are confident of their national development, in contrast with those below the average, who often worry about their national futures.

Worrying about national futures may be exhibited as fear. Fear is well understood from a personal biological perspective as “fight or flight” (Guy-Evans, 2023). However, the socio-cultural aspects of how fear may be generated as a collective emotion in respect of high-stakes international academic assessments as a cultural and social phenomenon, are less well understood (Borgonovi, 2021). The fear of failure has been reported to negatively influence entrepreneurial attitudes in a sample of 979 higher education students in Latin America (Sousa-Filho et al., 2023). Conversely, hope that educational development can lead to economic prosperity has long been reported (Niewwenhuis, 1997). In addition, it has been reported that hope can develop as a socially shared emotion in groups (Leino and Kulha, 2023). This leads to the obvious conclusion that fear and hope can be generated and then exhibited as socially shared emotions. The development of shared emotional responses goes beyond ideas of how the world shapes the self (Vygotsky, 1978) and explores how the world shapes the group through collective agency and exercised through social coordinative and independent effort (Bandura, 2001).

These accounts explain how the discourse of fear and hope emerges from international rankings and dominates the reactions of PISA participant countries toward their students' scores (Popkewitz, 2022a,b). It also provides us with a strong rationale for understanding why teachers become targeted as the object of education reforms (Thompson and Cook, 2014). The combination of international comparisons and rankings promulgates a new form of epistemological idea, by which teachers are expected to be responsible for national economic development. In this case, they are expected to act as accountable subjects who can meet their collective responsibility for national futures through high teaching quality (Ball, 1990). The achievement of this goal calls for performance management policy (Gewirtz et al., 2019), the realization of which relies on the combination of technologies of agency and performance, referring to empowerment and incentives respectively (Dean, 2010). This policy further stimulates the

idea of employability, which functions as an index for assessing teaching quality (Chiang et al., 2022). If teachers are incompetent in this national assignment, then according to the principle of governmentality, which is not to terminate the source of social risks but to transform the targeted groups into responsible or even enterprising subjects (Dean, 2010; Foucault, 2010), performativity should be employed to motivate them through its ability to engender a sense of dignity, social honor, and pride through the achievement of excellent teaching outcomes. Through performativity, unmotivated teachers are unable to escape the stigma of being viewed as a social burden, which is likely to make them feel incompetent and guilty (Ball, 2003, 2004; Holloway and Brass, 2018; Chiang et al., 2020). These psychological reactions function as a vital instrument by which the government is able to undertake the strategy of steering at a distance (Chiang, 2020) or introspective panopticon (Chiang et al., 2023), so that self-regulation can operate automatically in teachers' minds.

Because performance management policy is designed to audit and proliferate teachers' commitment to teaching quality, its attainment needs to be supported by specific frameworks of teaching competencies (Chiang and Trezise, 2021), which functions as standards against which teachers may measure their professionalism and being honor themselves (Spohrer et al., 2018; Chiang, 2020). When the concept of teacher competence incorporates the collective responsibility that teachers and the government are expected to fulfill, it becomes the index for evaluating the accomplishment of this responsibility. This situation positions teachers as governable subjects whose competencies can be scaled up through the project of reeducation. Reeducation is not simply a process of retraining teachers but involves the cultivation of voluntarism, as noted previously. More specifically, teachers need to clearly recognize their shortcomings in pedagogical practice, so that they actively improve their own competency. As this project symbolizes commitment, dedication, diligence and contribution, professional development is envisaged as a gateway for them to win social honor or at least social recognition. Based on these correlations, professional development or lifelong learning embracing the notions of obligation, sacrifice, dignity and honor, which fabricate teachers into self-regulators and self-improvers (Robertson, 2012; Tsatsaroni and Evans, 2014).

Teachers are obliged, therefore, to regard themselves as epistemic objects who are “engaged in a career long quest for better practice” (OECD, 2013, p. 67) and continuing professional development as the means for achieving this. The McCrone settlement (SEED, 2001) in Scotland which reviewed teachers' terms and conditions, for the first time quantified the idea of professionalism when it stated that teachers had to contractually undertake 35 h of continuing professional development. In line with global education policy, The General Teaching Council for Scotland (GTCS) in 2012 produced three sets of extended professional standards: mandatory Standards for Registrations for newly qualified teachers (GTCS, 2012a); non mandatory Standards for Career Long Professional Learning (GTCS, 2012b); and the Standards for Leadership Management (GTCS, 2012c). Interestingly, despite the prevalence of ‘professional development’

in earlier Scottish reports, such as the seminal *Teaching Scotland's Future* (Donaldson, 2010), by the time the revised standards were published just 2 years later, the language had changed from “professional development” to “professional learning.” The model of professional learning (Education Scotland, 2024) is based on the idea that educational professionals want to engage in professional learning to “stimulate” thinking to ensure that their practice is “critically informed and up to date.” The aim of the professional standards for the professional learner is to “self-evaluate and engage in critical reflective thinking about practice as part of regular, planned and ongoing professional learning dialogues and development” and to support professional growth and agency’ (Education Scotland, 2024). Whilst the language of neoliberalism and governance may be softer in Scotland than elsewhere (for example, England and Australia), the philosophy and language of educational reform since the 1990s is largely the same: measurements, targets, performance, control from a distance (surveillance) and regulation outputs (learning outcomes and assessment benchmarks as opposed to specifying what is to be learned) (Nieveen and Kuiper, 2012) whereby teachers, schools and local authorities become responsible for evidencing achievement. The global emphasis on and investment in professional development or professional learning is a response to the perceived crisis in the quality, competence and professionalism of teachers (Gore et al., 2022). Professional learning is, however, critical to the implementation of new curricula in countries such as Scotland, Wales, New Zealand and the Netherlands (Sinnema et al., 2020).

As these terms furnish teachers’ psychological perceptions, they are highly incentivized to participate in lifelong learning programs. Since such programs pledge to enable their participants to avoid becoming social burdens and level up their professional abilities (Andersson and Fejes, 2005; Säfström, 2005), strategically, they invigorate teachers’ image of how to become social contributors. In this way, pastoral power can effectively educate teachers in epistemological ideas related to social risks and prospects (Foucault, 2010; Pettersson et al., 2018; Chiang et al., 2024). Because teachers’ images of self are stored within their self-knowledge, promises can sophisticatedly refabricate this self-knowledge (Chiang, 2020). If such symbols dispatch human capital discourse, a global eye is exerted through a local eye (Kress, 1996; Chiang et al., 2023) as manifested in the phenomenon that teachers comply with the instructions of this discourse, as geared by the data governance of the OECD’s PISA. This scenario resonates with the notion of steering at a distance (Chiang, 2020) or non-interventionary intervention (Ball, 1998). More importantly, these governing technologies set out to reformulate teachers’ subjectivities and commitment through human capital discourse, and the discourse of fear and hope generated by international comparisons and rankings becomes a powerful device for performing the project of subjectivation. This is because discourses address social crises, directing us on how to think and act (Popkewitz, 1994), as evident in the case of teaching quality, which is presented as a moral issue affecting public interest (Sellar and Lingard, 2013).

## 5 Conclusion

It is apparent that the quantitative database of the PISA program facilitates international comparisons and rankings, enabling the OECD to promote a global vocabulary that connects teaching quality with national futures. While this alignment consolidates human capital discourse, its strategic deployment is much more subtle than direct instruction. More concretely, when participating countries can be distributed to the grid of rankings according to their test results on the PISA, stratified reputations are established, delivering hope and fear, according to the degree to which they engender confidence in the quality of a country’s human capital and associated international competitiveness, or the reverse. As these psychological terms constitute the self-knowledge that administers our thoughts and acts, they in fact carry out the discourse of fear and hope, serving as a power array to extend the influence of human capital discourse to the international community. This extension incites teachers to be accountable for national economic futures. If they fail in this national mission, they become sources of social risk, so unsurprisingly, public denunciations and social stigmas will be attached to them. These correlations capture the teacher-as-a-problem phenomenon, which has provoked a global education reform movement focusing on quality control of teaching. As teaching quality is argued to affect the quality of human capital and then national futures, teaching competence is a matter of public interest and has thus evolved into a moral issue, requiring teachers to not only perform as responsible subjects but also as enterprising subjects, who can improve their teaching competency through re-education. Since re-education bridges truth-telling and ethics, it transmits epistemological ideas to teachers’ minds, which effectively reconfigure the self-knowledge that activates care of self, spurring them to simultaneously engage in self-monitoring and collective surveillance. These denote that pastoral power can be exercised through re-education as it essentially mediates the integration between truth-telling and ethics by which care of self can be invigorated. Re-education calls on teachers to admit their own shortcomings in teaching competence, which is the demonstration of truth in free will. In this view, voluntarism opens their souls to perceive teaching quality as a moral issue, making the shift from self-regulators toward self-improvers achievable. In light of these relationships, professional development serves as a portal for teachers to perfect their teaching competence, and lifelong learning serves as the gateway for them to membership of the “club” of enterprising subjects who successfully accomplish the mission of national economic development through high teaching quality. These anecdotes designate that if teachers are willing to join the lifelong learning program, this indicates they accept its assumptions that they can honor themselves and become social contributors. As the admission of shortcomings above is about the relationship of self to self, which requires teachers to strive for self-mastery, enterprising subjects are thereby molded through the integrated fusion between teaching quality, human capital discourse, national futures, the discourse of fear/hope, truth-telling, and social contribution. Since these scenarios authenticate the exercise of subjectivation,

appropriating the realization of neoliberal governmentality, lifelong learning functions as a tactical instrument for the engineering of subjectivation, enabling the government to direct teachers' beliefs, vision, commitment, dedication, and actions.

## Data availability statement

The original contributions presented in the study are included in the article/supplementary material, further inquiries can be directed to the corresponding author.

## Author contributions

T-hC: Writing – review & editing, Writing – original draft, Project administration, Methodology, Conceptualization. AT: Writing – original draft, Methodology, Conceptualization. AM: Writing – original draft, Methodology, Conceptualization.

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