NORRAG SPECIAL ISSUE 03

Global Monitoring of National Educational Development: Coercive or Constructive?

PIPE Programa Interdisciplinario sobre Política y Prácticas Educativas CIDE

NORRAG Network for international policies and cooperation in education and training
Réseau sur les politiques et la coopération internationales en éducation et en formation

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NORRAG Special issue (NSI) is an open-source periodical. It seeks to give prominence to authors from different countries and with diverse perspectives. Each issue is dedicated to a special topic of global education policy and international cooperation in education. NSI includes a number of concise articles from diverse perspectives and actors with the aim to bridge the gap between theory and practice as well as advocacy and policy in international education development.

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NORRAG is a global network of 5,000 members for international policies and cooperation in education established in 1986. NORRAG's core mandate and strength is to produce, disseminate and broker critical knowledge and to build capacity among the wide range of stakeholders who constitute its network. These stakeholders inform and shape education policies and practice, both at national and international levels, and are united by a shared commitment to principles of social justice, equity and quality in education. Through its work, NORRAG actively contributes to critical dialogue on global developments in education by mobilising and disseminating diverse voices, multiple perspectives, facts and evidence.

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Global Monitoring of National Educational Development: Coercive or Constructive?

Guest editor

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Foreword

Over the last few decades, considerable efforts have been directed towards developing internationally standardized ways of monitoring aspects of education from management to learning outcomes. Large-scale international assessments mobilize significant resources nationally and internationally and are increasingly influential on norms and policies. They can also have unintended consequences, notably by shifting objectives from those of inclusion and diversity to competition between countries, actors and learners.

NORRAG's work in this area aims to contribute to illuminating the role of data and indicators in global governance frameworks for education and to question the implication of standardizations shaped by governance frameworks, with a specific emphasis on the education-relevant SDG goals and frameworks[1].

NORRAG Special Issue 03 Global Monitoring of National Educational Development: Coercive or Constructive? offers a panel of reflexions on how global reports and indicators shape the global development agenda. Bridging the gap between theory and practice as well as advocacy and policy, authors were invited to assess the reception and impact of these reports on global governance, agency and thematic focus. The issue seeks to question the possible disruptive effect of global reports and international standardized tests on national policies, and the practicability of developing global recommendations in a world of diversity. It also seeks to show how national policy actors, members of civil society and national researchers make use of these reports.

The issue is composed of four sections that speak directly to policymakers, scholars, practitioners, civil society organizations, and stakeholders. Each section focuses on a specific theme related to global monitoring of national educational development:

Part one introduces the main objectives of global monitoring reports and put them into perspective. While it demonstrates how data have an impact on national educational policy, it also highlights how the conception and funding of these reports may disregard parts of the population who are already experimenting forms of marginalization
In response part two proposes a set of analyses on how to improve monitoring reports. This section seeks to explore how monitoring reports can be best articulated in relation to local needs and priorities, notably access and quality.

Part three investigates communication and dissemination approaches of results. Introducing three case studies, this short section offers reflections about the legitimacy of such tools and the role of media in the national reception of international monitoring reports.

The concluding and fourth part delves into the impact of global reports on education policies, exploring a selection of case studies from Chile, Mexico, South Africa, Sweden, as well as regional overviews from Middle East and North Africa.

Continuing on the work initiated in *NORRAG Special Issue 01 on the Right to Education Movements and Policies: Promises and Realities* issued in 2018, and NSI 02 on *Data Collection and Evidence Building to Support Education in Emergencies*, issued in 2019, this issue aims to encourage diversity of backgrounds and approaches. A particular emphasis of this third issue, published originally in Spanish, is on Latin America and expands to the global South & East.

NORRAG is thankful to the guest editor, Marisol Vázquez Cuevas, executive director of the Maison Universitaire Franco-Mexicaine (MUFRAMEX), in France, and former executive director, research coordinator and associate professor at the Interdisciplinary Program on Education Policy and Practices, Centro de Investigación y Docencia Económicas, in Mexico. Marisol Vázquez Cuevas has an extensive experience supporting national educational reforms and evaluation, involving development agencies, which is reflected in this NORRAG Special Issue.

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Endnotes

1. The politics on data and indicators is one of NORRAG's main thematic areas, entitled "International Policy Agendas and Global Governance" https://www.norrag.org/politics-of-data-and-indicators/

Contents

The impact of global reports on education policy: Are they really aiming to improve education across the world?

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This third number of NORRAG Special Issue aims to analyze the impact of global monitoring reports on education and educational policy around the world. The articles that make up this issue provide valuable insights and perspectives about the way education reports are perceived, announced, received, and produced by international organizations. These articles are divided into four sections. In the first section, the objectives of global monitoring reports and international learning assessments and their impact on the design of international education policy are raised and questioned. In the second section, recommendations to improve or complement these reports are offered. A third section addresses the issue of how these reports are presented, their limitations and the importance of translating and transmitting the relevance of their findings to the public opinion. Finally, we present, in the fourth section, case studies on the impact that education reports have had in various countries and regions of the world such as: Sweden, Mexico, Chile, the Middle East and South Africa.

Main Objectives of Global Monitoring Reports

Steiner-Khamsi states that the goal of global monitoring reports is not limited to sharing statistical information about the state of education in the world. The article presents a critical perspective on the impact that global monitoring reports have had on education. It argues that those reports, justified by their not-so-neutral interest in measuring and monitoring progress, constitute efforts that subtly guide and influence world education policies. The author claims that we are probably living a "governance at a distance by means of data circulation" which exacerbates the tendencies towards (i) conditioning international aid to achieving the goals stated in these reports, (ii) applying more standardized tests and (iii) collecting and analyzing a greater amount of data.

Mundy presents three approaches that explain the impact that global reports have had on education. The first is the "data for cross-national learning" approach, which explains and justifies the existence of reports as a tool for nations to get informed and exchange best practices. A second approach, "data for strategic investments and incentives", focuses on providing technical support to governments and policy makers to achieve greater impact. A final and more recent model is the "data for (mutual) accountability" one. It not only promotes transparency, but also gives donors control, and allows citizens to demand accountability from their governments. The author also presents a critical analysis and the limitations of each approach.

While Steiner-Khamsi presents a critical point of view on the current monitoring efforts of international organizations, **Schleicher**, resorting to the theory of change mentioned by Mundy "data for cross-national learning", supports the need for hard data to compare education systems' results and conditions. Schleicher states that "[International assessments and global monitoring tools] can help policy makers to set meaningful goals based on measurable objectives and can foster a better understanding of how different education systems address similar problems."

The position of Schleicher is also questioned by the contribution of **Ledger, Thier, Bailey, and Pitts**. In this article, the authors use critical discourse analysis to examine the metrics of global competence presented by the Organisation for Economic Cooperation and Development (OECD). As a result of their analysis, they suggest that these metrics are defined in terms of the cultural capital of a Western global elite which does not consider the values, practices and resources of the marginalized populations. **Coustère**, on the other hand, highlights the insufficient international investment in the production of statistics or knowledge in education, which is only 3% compared to 21% in the health sector. Nevertheless, he also argues that the data itself will not have an impact if the "local values or circumstances" that perpetuate the belief that public action does not have the capacity to modify people's real living conditions are not tackled.

Raudonyte asserts that international evaluations, such as the Programme for International Student Assessment (PISA), exert a soft power on the definition of education policies. The author argues that "what is measured in education systems matters, as this is likely to influence the way governments approach education reforms". The article states that the use of these data is not neutral either, since governments resort to information and to international organizations to justify internal policies at their convenience.

How to Improve These Reports?

Fredriksen raises the voice about the risks involved in the Sustainable Development Goals (SDGs) giving the same weight to access and quality of education in sub-Saharan African countries, where still high percentages of young people remain unschooled and illiterate. As global reports on education do not prioritize access over quality, the voices of the most vulnerable populations risk being further weakened. **Heredia**'s contribution coincides with Fredriksen because it states that the pursuit to improve "education quality" promoted by global reports does not represent a desirable solution in such unequal societies, as it is the case of Mexico (the country analyzed by the author). The article proposes that the inclusion, retention and reintegration of disadvantaged groups into education systems should precede the quest for quality in itself.

Global education monitoring reports, while allowing other nations to have access to statistical and analytical information that they would not otherwise have, largely forget to include the vision and experience of local actors and the education community. **Vázquez del Mercado** addresses this issue and proposes that public policies should take into account local needs when trying to meet global goals. This perspective is also supported by **Salieri**, who presents the example of "Learning in 21st Century Schools", an infrastructure cooperation project involving 12 countries in Latin America. Salieri states that this cooperation is an example of a regional monitoring and cooperation scheme that has gathered information on infrastructure at the local level to then issue recommendations based on a pertinent analysis of the needs and characteristics of each participating nation. **Villalobos and Delprato** take up this analysis on infrastructure and celebrate that this information is included in UNESCO's Third Regional Comparative and Explanatory Study (TERCE) on quality of education in Latin America. These efforts provide findings and solutions that can be more immediately and pertinently implemented in low- and medium-income countries, than those coming from global studies that offer recommendations more in line with the needs of developed countries.

Finally, experts provide recommendations on ways in which global monitoring can be improved by including two topics that are currently not sufficiently addressed. The first is international higher education rankings, mentioned by **Maldonado**, and the second, impact of international education in the form of educational exchange programs, as presented by **Martel**. On the one hand, the current higher education quality assessments are of poor quality and highly influenced by private institutions. Maldonado states that international organizations have not involved themselves in this regard yet. On the other hand, Martel argues that international educational exchange programs already represent a common practice worldwide which affects the formation of the workforce and contributes to personal and professional growth. Therefore, it would be pertinent to give greater visibility and attention to these practices and experiences in international reports.

Communication Strategies and Dissemination Of Reports' Results

One of the greatest challenges lies in giving meaning to international findings that have become insignificant and irrelevant in their own contexts (Steiner-Khamsi, 2016). And this is not a simple task. This is the topic addressed in this section. The section is composed of three articles, two of them presenting the case of the dissemination of international reports and assessments' results in Mexico and one presenting the case of Cambodia. **Ortiz** believes that the dissemination and attention given by the media to the publication of global education monitoring reports' results has been declining in Mexico because international organizations have not been able to explain the impact or relevance of these studies for understanding or explaining the state of education in Mexico. **Arteaga** presents a communication campaign that was held in Mexico around the application of the PISA test in 2009. The article highlights the importance of raising awareness and bringing international and national assessments closer to the education community by explaining why they are important and what implications they will have -or not- in their educational future. The case of Mexico is a great example of a society in which education actors have the freedom to express their needs, demand improvements, and promote changes. However, this is not the case for all nations. **Maeda** presents the case of Cambodia where the voices of the media and those of educational actors are being silenced by the current dictatorial government. This situation makes it impossible to follow global reports' recommendations and for citizens to put pressure on the government to improve the education system.

International Impact Experiences

This section presents case studies on the impact that global education monitoring reports and assessments have had recently. **Grek** presents the emblematic case of Sweden, in which through a socialization process, an absolute consensus has been created on the importance of PISA

and the OECD. This consensus directly affects educational policies and shows that the theory of a "governance at a distance" by international organizations, and specifically by the OECD, does not apply to the case of Sweden, in which experts seem to be always present in the national scenario.

The following four articles deal with cases in Latin America. **Rojas** argues that the large-scale education reform that took place in Mexico in 2013 was strongly determined by the influence of international organizations such as the OECD. This reform would not have been possible without the guidance of the analysis and recommendations of these organizations. However, this undeniable adoption of international recommendations, as the author states, can be a double-edged sword to the extent that today the reform is at risk. Considering it an "anti-national project", the current President of Mexico has decided to withdraw it. Considering that the President holds the majority in Congress, the reform efforts will likely vanish.

García, on the other hand, presents his experience as Director of a school in Oaxaca -one of the states most aligned with the political left in Mexico- in 2009, when the campaign to familiarize teachers and students with the PISA test took place. He mentions how the government at that time seemed determined to do everything to improve the results of Mexico in the test turning it into a quasi-marketing campaign. This very important period for Mexico's education policy is also addressed by **Puma**, who argues that 2009 was the last time that PISA tests could be applied in the region of Oaxaca. After the great effort undertaken by the government to prepare teachers and students for PISA, the failure to increase Mexico's PISA scores, -together with other political conjunctures-, led to the Oaxaca population taking up arms against any type of assessment and against the implementation of the 2013 Education Reform in general. The reform ended up not being carried out in that region. **Avalos** addresses the influence of international organizations on Chile's education policy, in particular, on the reforms carried out between 2015 and 2018. The article argues that international reports and evaluations have allowed for the approval of laws that seek a more inclusive system, equipped with better trained teachers and with adequate working conditions.

Colin addresses the cases of the Middle East and North Africa. The study supports the idea put forward by Fredriksen and Heredia in the second section of this issue. It states that access to education in this region of the world, and most likely in developing countries, represents an obstacle to increasing standardized test results because low-income students face greater structural challenges, which negatively impacts their level of performance. Their inclusion in the test lowers the average performance scores. This explains a large part of the fall in the Trends in International Mathematics and Science Study (TIMSS) results that caused so much alarm in 2015. It results hard to set up these two goals (access and quality) when one affects the other, and access should definitely be a priority. Finally, **Yunus and Badroodien** present the case of South Africa in its post-apartheid commitment to align national school policies with global monitoring reports, such as the Global Education Monitoring Report (GEMR). It highlights the specifications of the South African School Law (1996), which created a system with two levels of education in South Africa after 1994. The article discusses how, recently, there has been a new spectrum of public-private partnerships that providing education to the poor and questions South Africa's greatest commitment to achieve the SDGs.

In Summary

This NORRAG Special Issue highlights the legitimacy of global education monitoring reports as rigorously constructed statistical instruments, as well as their usefulness to understand the state of basic aspects of education internationally. It also shows us that the usefulness of these reports is limited by the way in which the reports are integrated, used and presented. Biased by the insufficient inclusion of cases and perspectives from developing countries, offering recommendations that are not always contextualized and sharing best practices that are inaccurate and irrelevant to many disadvantaged contexts, these reports and studies deserve an in-depth analysis on how they can be improved to achieve their final goal of contributing to improve education globally.

The articles that integrate NSI 03 allow us to know more about experiences in which these reports have had great impact, highlighting the cases of Sweden, Mexico, and Chile. They also explore the experiences of how these reports are presented to the public, and how there seems to be no serious exercise in transmitting and translating the findings to the public. Including the voices of local actors, negotiating with internal stakeholders - either simultaneously or before negotiating with international organizations- about any type of reform that directly affects their interests are also key factors to ensure that these policies, based on the recommendations of experts, will survive. As Grek asserts, the socialization process is key.

It is also important to keep in mind that these organizations have interests that go beyond improving education globally. The neutrality of their recommendations gets skewed as they find ways to have more countries captive of these assessments through exercises such as the Human Capital Index of the World Bank, mentioned by Steiner-Khamsi. As for the areas that these reports could include in the future, international higher education assessments and

the impact of international academic exchange programs are explored. The issue of the constant struggle between access and quality of education is emphasized as well as how complicated it will be for developing nations to address both aspects, as proposed by the SDGs, when it seems that improving one indicator implies affecting the other. Many aspects of the impact of global monitoring education reports remain to be addressed, but this number is expected to contribute to deepen the debate on the topic.

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Part 1

Main Objectives of The Global Monitoring Reports (GMR)

Governance at a Distance by Means of Data Circulation

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Summary

This article asks whether governance by numbers has metamorphosed into governance at a distance by means of data circulation. The global monitoring of national developments in education is presented as a result of, and as simultaneously exacerbating, the trend towards (i) results-based aid, (ii) more testing, and (iii) data mining and circulation. As the World Bank becomes the knowledge bank for all countries, the article also explores the changes on the definition of development and aid eligibility that might take place.

Keywords

Governance by numbers
Results-based education
International organizations
Official development assistance
Global education

The term "governance by numbers" has made a remarkable journey over a brief period of ten years. Introduced into policy studies ten years ago to describe the exponential growth of international large-scale student assessments (ILSAs) (Grek, 2008) and the shift from external evaluation to self-evaluation (Ozga, 2009), it is nowadays used as an umbrella term to capture the datafication of political decisions by means of baseline studies, benchmarking and evaluation of outcomes. These "soft" policy tools share an interest in measuring and monitoring results.

Arguably, the "hard"-type tools of regulation—decrees, random inspections to check on the implementation of the decrees, and sanctions for non-compliance—have been replaced with a governance by numbers. In education, the outcomes orientation has triggered a proliferation of ILSAs. Depending on their political agenda, national governments are nowadays using the results from ILSAs, such as PISA and TIMSS, to either generate or alleviate reform pressure on public education. Ten years later after the term first surfaced, the question has become: should we perhaps take the debate in policy studies to scale and ask whether governance by numbers has morphed into "steering at a distance" (Rose and Miller, 1992), "governance at a distance" (Rinne and Ozga, 2009, p. 67), or to take it a step further, metamorphosed into "governance at a distance by [means of] data circulation" (Piattoeva, Gorodski Centeno, Suominen and Risto, 2018, p. 117). The annual monitoring reports of the three international regimes in education, notably *Education at a Glance* (OECD), *World Development Report* (World Bank), and the *Global Education Monitoring Report* (UNESCO) come to mind here.

Governance at a Distance through Data Circulation

In a fascinating chapter on the politics of national large-scale assessments, Nelli Piattoeva et al. (2018) coined the term "governance by data circulation" to demonstrate how the national governments of Brazil, China, and Russia (the objects of their study) use the circulation of comparative data as a policy tool to legitimize political decisions. This finding is not to be underestimated given that all three countries face major

challenges with the availability of reliable data and given that government officials at the district and local level are at a loss with how to actually make use of the data in their own daily work. The governments of the three countries are not alone with having to constantly produce internationally comparable data only to then, with great difficulty and with a stretch of their imagination, translate the international findings back to the national or local level. Theirs is the ordeal to having to make sense of international findings that have become (contextually) "thin" to the extent that they lost meaning and relevance in their own context (Steiner-Khamsi, 2016a).

This "non-sensical" situation only makes sense if we see the larger context for the fast advance of governance at a distance by means of data circulation. I would like to confine my comments to three observations, summarized as follows: The global monitoring of national developments is a result of, *and* simultaneously further exacerbates, the trend towards (i) results-based aid, (ii) more testing, and (iii) data mining and circulation.

Results-based aid. We have entered a new era in which the previous set of macro-economic and political conditionalities for aid (structural adjustment, poverty alleviation, good governance) have gradually been replaced with programmatic conditionalities. Today, the funded project must demonstrate that the results meet the target established in the project plan, the sector strategy, or the donor's definition of a successful project. For example, the Asian Development Bank differentiates between program and policy support and utilizes its disbursement schedule as a leverage to ensure that policies are indeed put in place that make the funded project sustainable over the long run. Similarly, the Global Partnership for Education distinguishes between the fixed and the variable part of the grant. Recipient governments need to prove with numbers that the funds have been used to improve the quality, learning outcomes, and equity in the educational systems. It is important to bear in mind here that the Global Partnership for Education is a notable exception. Not all donors are committed to enforcing equity. One of the criticisms of social impact bonds, for example, is the lack of equity concerns and the short time frame during which implementers have to fabricate measurable, positive results. Unsurprisingly, implementers shy away from enrolling "slow learners" and other vulnerable groups in their educational programs.

More testing. We have become accustomed to watching the list of countries participating in PISA and TIMSS grow longer and longer over the past decade. What happened in 2018, however, will most likely generate a quantum leap in the number of countries that will participate in the future in ILSAs. The *2019 World Development Report* (World Bank, 2018) made the human capital project and notably the Human Capital Index (HCI) known to a broader audience in October 2018. According to the World Bank (2018), The HCI measures the amount of human capital that a child born today can expect to attain by age 18. It conveys the productivity of the next generation of workers compared to a benchmark of complete education and full health.

The education component of the HCI measures both the quantity (learning adjusted years of schooling) and the quality (harmonized test results) of educational systems. The benchmark for years of schooling is 14 and the experts at the World Bank established that, from all the educational systems in the world, Singapore comes closest to the international benchmark of "complete education." It is a system where children's time at school is used most effectively or, to put it differently, least wasted. Similar to Singapore, children in Austria, for example, are also expected to complete 13.9 years of school. However, their learning-adjusted number of years of school —factoring in what children actually learn— is only 11.7 years. Angola, another country at the head of the alphabet, loses almost half of its educational attainment due to the poor quality of education. Taking into account what children actually learn in schools of Angola, the expected years of school shrinks to 4.1 years (see http://www.worldbank.org/en/publication/human-capital). The HCI rank for Austria is 12 and that of Angola is 147 out of 157 countries. The methodology for computing harmonized test results has drawn criticism for its reliance on ILSAs. Furthermore, the human capital project has interpolated data if countries did not participate in each round of the tests and/or extrapolated data if data on one of the tests was missing. In effect, the HCI coerces governments to participate in each round of TIMSS, PISA, PIRLS, SACMEQ, EGRA, etc., because inter and extrapolations are often detrimental to the education system's harmonized test results.

Data mining and data circulation. How much is too much? In a competitive global monitoring environment, international organizations collect more and more data in an ever-increasing number of countries, topics, segments of population, and in an ever diminishing time interval. For the sake of their own survival, international organizations are under pressure to constantly expand their sphere of influence to keep pace with their international and regional competitors. The early sign of an ever-increasing expansion was PISA's decision to include an additional domain. Initially focused on reading, mathematics and science for 15-year old students, the test began to include an additional domain on a wide range of topics, ranging from financial literacy (PISA 2012, PISA 2015) to global competence (PISA 2018). Concurrently, its portfolio also includes PISA for Development, Pre-School PISA, PISA for Schools, and PISA4You. PISA's rapid expansion across topic, countries, and the life-span has become an object of intense scrutiny and debate (see Addey, 2017; Gorur, 2016; Sellar and Lingard,

2014; Verger and Parcerisa, 2017). The private sector greatly benefits from PISA. Pearson LLC, for example, is paid for designing and piloting the test and for producing videos and reports. At the same time, the business giant sells textbooks and materials to parents in preparation for standardized tests. As explained and problematized elsewhere (Steiner-Khamsi, 2016b), standards are good for business because the same curriculum, teacher training program, textbook, and student assessment may be used in an endless number of schools, districts, and countries, thereby generating an economy of scale.

Raising the Bar for Development, Creating New Types of Technical Assistance Clients

The community of development partners faces a positive problem. In several regions, notably in Central and Latin America and in South East Asia, countries are graduating from Official Development Assistance (ODA). These countries ceased to be classified as low and lower-middle-income economies and therefore have become ineligible for concessional loans and grants. It is, therefore, an opportune moment to ask, what is to become of OECD DAC, the World Bank, UNESCO, bilateral donors and— perhaps too close for comfort—what is to become of us, the experts who built a career on working in aid or studying development?

First, the definition of ODA is not written in stone. Since its inception in 1969, OECD DAC has continuously "modernized" or adapted the concept to the changing aid environment (Hynes and Scott, 2013). Second, the targets of external financial assistance have changed. OECD, for example, identifies 57 countries as fragile states (OECD DAC, 2018). Finally and importantly, the Sustainable Development Goals 2030 got rid of the differentiation between developed and underdeveloped countries and replaced it with a global agenda, targeting each and every country in the world. In retrospect, we must acknowledge that the two previous, internationally agreed scripts—the Education for All 2000 and the Millennium Development Goals 2015—were labelled by mistake a "global agenda."

The new global orientation of the SDGs 2030 explains why international organizations are now operating at a truly global level. The World Bank and UNESCO used to be the organization for the poor, whereas OECD focused on rich countries. Now, all three international organizations collect and circulate information on all countries. The list of non-OECD "partner countries" is growing with each new, annual release of *Education at a Glance*. Most visibly with its human capital project, the World Bank, in turn, has become the knowledge bank for all countries, poor and rich. If the Human Capital Index will replace the Human Development Index in a not too distant future, the definitions of development and aid eligibility will undergo a revolutionary change: every country—except for Singapore and a few other East Asian countries that have excellent harmonized tests but including Austria and other "underperforming" OECD countries—will become clients of OECD, UNESCO, and the World Bank. They will receive aid, or rather technical assistance, on how their population, ranging from the age group of babies to adults, should improve the test scores on a wide range of topics, including social and emotional skills (OECD PISA, 2018).

In addition, the large number of "underperformers", such as Angola, Egypt, South Africa and other countries whose educational attainment was statistically cut in half, or more, by the Human Capital Index because children in their countries waste their time at school learning little, are likely to receive excessive aid or technical assistance. As a result, the empty slots left behind by countries that graduated from ODA will be taken up by countries that rank low on the Human Capital Index. In other words, even though many countries have graduated from aid, HCI has made it conceivable that the same countries that already matured economically, will be possibly brought back and become eligible for Official Development Assistance. Unsurprisingly, there is a great correlation between GNI/per capita, productivity, and HCI. Provided that HCI will be indeed used as one of criterion for determining the eligibility for concessional loans and grants, the World Bank may very well operate in the future in countries that are now classified as upper-middle and high-income economies. If the future scenario really holds, the categorization of countries will no longer be along GNI/per capita (low, lower-middle, upper-middle, high income) but along the projected productivity of a country (25th percentile, 50th percentile, 75th percentile), as proposed in the human capital project (World Bank, 2018, p. 59).

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Making the Implicit, Explicit in Global Programs for Reporting on Learning, Equity and Finance – A Theory of Change Approach

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Summary

This article seeks to question the possible disruptive effect, with positive or negative consequences, of global reports on national policies, and the feasibility of developing global recommendations in a world of diversity. It presents three underlying "theories of change": "data for cross national learning approach"; the "data for strategic investment approach" and the "data for (mutual) accountability approach." It also seeks to show how national policy actors, members of civil society and national researchers make use of these reports.

Keywords

Theories of change
Accountability
Incentives
Global monitoring

Introduction

The last 75 years have seen a surprising rise of new forms and uses of transnational and comparative data on educational policy at the global level. In this short piece, I argue that three underlying "theories of change" are implicit in arguments about transnational data and reporting, implying very different visions for how these data will be used (Brest, 2010).

One – which we might call the **"data for cross-national learning"** model, is focused on using transnational levers to foster cross-national learning and exchange. A second theory we might entitle the **"data for strategic investments and incentives"** model that is focused on the development of stronger fulcrums for incentivizing domestic policy and policy makers. A final model – one that has more recent origins - is the **"data for accountability"** model.

Each of these models has emerged in a different historical period; and as I highlight they are increasingly blended in the work of international institutions and advocated by different types of organizations.

Nonetheless, I believe we can draw on the three theories of change for heuristic purposes, as "ideal types" in order clarify the goals, purposes, and organizational features of different approaches to international reporting and make the implicit explicit in ways that open up the possibility for more democratic and impactful use of global data.

Changing Imperatives and Theories of Change in Global Education Reporting

Each of three "theories of change," provides a different rationale and approach for transnational reporting and data on global education. They have different impacts and implications

for domestic policy-making and policy makers, and for global level politics among states and international actors.

Data for Cross National Learning: The early establishment of globally comparable metrics on education systems by The United Nations Educational, Scientific and Cultural Organization (UNESCO) after World War II was carried out primarily in an effort to support collegial, cross-national learning among governments about policies and programs and to monitor global development. UNESCO created a system based on low stakes self-reporting of data. The model was fundamentally developmental and supportive of national statistical capacity and national capacity and ownership. Similarly, the Organisation for Economic Cooperation and Development (OECD) in its early years worked primarily as a peer review and peer exchange mechanism, with studies and reports primarily mandated by groups of Ministers facing specific challenges. The early advances in cross national learning assessments followed a similar "low stakes" logic (the International Association for the Evaluation of Educational Achievement was established as a research laboratory, to allow cross national learning).

Data for Strategic Investment and Incentives: The 1980s and 1990s saw a shift towards the use of educational data to prioritize and validate educational investments, especially those from global actors to developing countries. Transnationally, the World Bank emerged as a leading voice in the need for and the use of comparative educational data to support economic modeling of priorities and strategies for education and piloted the use of this data to create incentives for reform (see World Bank, 1995). In the 1990s, the OECD pioneered the Programme for International Student Assessment (PISA), which became a powerful influencer on national policies, irrevocably shifting its education work from being a modest platform for educational policy dialogue among countries towards its current stature as a policy entrepreneur in its own right (Martens and Jacobi, 2010). Rather than the softer approach to learning, the World Bank and OECD pioneered mechanisms with a ToC that privileged an external, technical pivot at the global level was mobilized to leverage national decisions and prioritization.

Data for (Mutual) Accountability: Since 2000, we have seen an additional "theory of change" layered on top of these two original ones. We might call this the "data for accountability ToC" – an approach that emphasizes the need to use transnational data to hold governments to account for achieving strong results based on their plans and commitments. This ToC blends two very different logics: one hand, a strong focus on "results and performance" in the development community, and on the other, new efforts by an active civil society movement for utilizing transparency and social accountability in educational systems, and the commitments to mutual accountability across national and international scales embodied in the Paris Declaration on Aid Effectiveness. Thus donor governments increasingly rely on performance metrics to manage their aid allocations and push domestic policy makers to use metrics and incentives to push for stronger outcomes (as for example, the UK's multilateral aid review); while civil society presses for both upward accountability from donors to aid recipients and downward accountability from governments to their citizens (see for example the World Bank's World Development Report 2004; Verger & Novelli, 2012).

Many authors have written about the pros and cons of these varied rationales and theories of change for transnational data and monitoring. Each seems to have both intended and unintended consequences – at the global and the domestic policy levels.

- The **"data for cross national learning and exchange"** ToC has the putative advantage of creating real communities of practice among developing countries and keeping the focus on the national capacity for generating data. At the same time, transnational data collection and monitoring in the 60s, 70s and 80s quickly got stuck on inputs and descriptive data. This theory lacked a strong set of incentives for mobilizing international and domestic action and had no way to measure effectiveness.

  One lesson international organizations may have learned from the "data for learning" ToC is that when reporting is not linked to incentives for action, support for it can easily wane – as for example, in the gradual decline in support for UNESCO its statistical reporting in the 80s and 90s; which was only to be revived as part of the new movement for "accountability" which emerged after the adoption of the 2002 development consensus embodied in the Millennium Development Goals, and the creation of more vigorous accountability oriented reporting in the Global Education Monitoring Report.

- The **"data for strategic investment" ToC** identified a key pathway for linking transnational education data to action. But it lacked a theory about how states and other policy actors might "learn" through collaboration and tended to produce technocratic exercises in data collection and utilization. Such an approach was better suited to the delivery of aid packages and the introduction of performance-based financing than to generating domestically- owned reform coalitions. PISA, which emerged under the aegis of a club of countries, undoubtedly had the greatest "success" of any transnational data effort under the "data for strategic investment" model. Yet while it has much to teach us about how data that starts from a collaborative

partnership can gradually create an external fulcrum for policy change out of a formerly weak international actor. Yet PISA's effects on education policies were highly varied depending on national policy and political regimes.

Major investments in education development data during this period had a surprisingly limited impact on developing countries. Perhaps this can partly be explained by the lack of genuine collaboration among countries behind "data for strategic investment" efforts.

- The **"data for accountability"** theory of change was arguably clearer about how data could be used to hold both donors and governments to account and spur change. It gave an expanded role to citizens and showed how transnational processes could work with domestic coalitions together to achieve reforms. Yet this theory of change also underestimated the extent to which data would be able to drive policy processes in the context of weak governance. At the global level, governance structures are rarely formalized in ways that produce strong accountability. Monitoring such as that provided by the UNESCO Global Education Monitoring Report (GEMR) are weak tools for holding donors and multilaterals to account – particularly when political winds, like that which drove the aid effectiveness agenda, change direction. This weakness is drawn into relief when more politicized efforts at monitoring and reporting, such as the Education Commission, overtake traditional accountability reporting. Across developing countries characterized by weak democracies and limited bureaucratic capacity the ability to use evidence to "hold truth to power" is very constrained, as documented in reports on Citizen Led learning assessments and on national civil society coalitions.

Global Monitoring for Learning and Accountability: Making the Implicit Explicit

In this short piece, I've tried to show how a stronger and more explicit use of a theory of change approach can help us understand why and how global monitoring and reporting work. Theories of change can help us to make the implicit explicit, and in doing so open up the debate on the purpose, use and democratic possibilities for impactful cross-national monitoring in a changing world.

Organizations like the Global Partnership for Education (GPE), are experimenting with these different theories of change. GPE has tried to use a "mutual accountability" approach to monitoring, face challenges on both ends of the spectrum – in ensuring data is used in national level processes of accountability among education stakeholders, and also to hold donors to aid effectiveness principles (see GPE, 2018). In response, GPE is seeking to supplement its focus on "mutual accountability" with a "country level partnership learning" approach, which may be more suited to sustaining improvements in such areas as the transparency of financial reporting, the use of data in national policy processes, and the achievement of aid effectiveness principals within developing countries.

The UNESCO Institute for Statistics (UIS), working through the Global Alliance to Monitor Learning (GAML), is also taking a similar, measured approach to monitoring, one that combines efforts to improve the technical quality of underlying data while also creating a strong collaborative to foster cross national learning (UIS, 2018). This ability to draw on both learning and the (mutual) accountability theories of change for global reporting and monitoring will be, I believe, essential to the sustainability, impact and broad-based ownership of global monitoring over the next decade.

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Helping Education Look Outward

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Summary

This article argues that global monitoring and international comparisons show education policies developed and implemented beyond their borders, and it helps policy makers to set meaningful targets based on measurable goals, and to foster a better understanding of how different education systems address similar problems. It asserts that global monitoring is not about copying prefabricated solutions from other countries; it is about looking at good practice in our own countries and elsewhere to become knowledgeable of what works in which contexts.

Keywords

OCDE
Global monitoring
Good practices
Policy makers

There is a story about a driver who, on a dark night, finds out that he has lost his car key when getting back to his car. He keeps looking below a streetlight – and when someone asks him if that is where he dropped the key, he says no, but that is the only place he can see anything.

In education too, there is a deep-rooted instinct to look at what is closest to hand and easiest to see. It may not be the best place to look, but it is where there are familiar questions and answers. Often, we review progress in education by what is easiest to measure rather than by what is most important. And debates on education are often based only on what's going on within a country's or a region's own schools, rather than on comparisons with what is achieved elsewhere.

While globalisation is having such a profound impact on economies, the workplace and everyday life, education remains very local and often inwards-looking. Education systems have a habit of building "walls" that separate teachers, schools or the systems themselves from learning from each other. The way schools are organised and the way information is managed can make it difficult for schools and teachers to share knowledge about their work. While those who run education systems may have access to knowledge about their strengths and weaknesses, those who provide education services at the frontline – school principals and teachers – often do not, or they may not know how to translate that knowledge into more effective practices. Similar walls separate the education systems of different countries, with few opportunities for countries to look outwards to education policies developed and implemented beyond their borders. In other words, there is not much learning from other countries' experiences.

International assessments and global monitoring tools can help fill that gap. They can show countries what is possible in education, in terms of the quality, equity and efficiency of services achieved in other countries. They can help policy makers set meaningful targets based on measurable goals, and they can foster better understanding of how different education systems address similar problems. Perhaps most important, an international perspective provides an

opportunity for policy makers and practitioners to have a much clearer view of their own education systems, one that reveals more of the beliefs and structures, strengths and weaknesses that underlie their systems. An education system has to be profoundly understood before it can be changed and improved.

In 1997, when we embarked on developing the Organisation for Economic Cooperation and Development (OECD) Programme for International Student Assessment (PISA), I received a call from the office of Brazil's president: Brazil was interested in joining PISA. Brazil was the first country that was not a member of the OECD that expressed an interest in joining PISA and, in a way, I was surprised. Then-President Fernando Henrique Cardoso must have been aware that his country would come out at the bottom of the global league tables. But when I discussed that with him later, he told me that the biggest obstacle for improving Brazil's education system at that time was not a lack of resources or capacity, but the fact that students were getting good marks despite low standards. Nobody thought that improvement was needed or possible. Then-President Cardoso felt it was important for people to understand the truth. So, Brazil did not just publish a national PISA score but provided every secondary school with information on the level of progress that would be needed to score at the OECD average level on PISA by 2021. Since then, Brazil's improvement in PISA has been remarkable. Nine years after it participated in PISA for the first time, Brazil stood out as the country with the largest improvement in reading since the first PISA assessment was conducted in 2000.

Mexico had a similar experience. In the 2007 Mexican survey of parents, 77% of parents reported that the quality of education services provided by their children's school was good or very good even though, as measured by the PISA 2006 assessment, roughly half of Mexico's 15-year-olds were enrolled in schools that scored at or below the lowest level of proficiency established by PISA. There could be many reasons for such a discrepancy between the perceived quality of education and performance in international comparisons. For example, the schools Mexican children attend now might be of higher quality than those their parents had attended. But the point here is that it isn't easy to justify an investment of public resources when there is no public demand for it. In February 2008, I met Mexico's then-President Felipe Calderón who established a PISA-based international performance benchmark for secondary education in Mexico. This performance target highlighted the gap between national performance and international standards and became a major tool to support the improvements which Mexico has seen since.

It is not just low performers where PISA has had a major impact on policy. In my home country, Germany, the education policy debate that followed the publication of the PISA 2000 results was intense. Germans had taken for granted that learning opportunities were equal across schools, as significant efforts had been devoted to ensuring that schools were equally resourced. But the PISA 2000 results revealed large social disparities in education outcomes. Also, the evidence of consistency across schools in Finland, where performance differences between schools accounted for only 5% of the variation in student performance, left a deep impression in Germany, where performance differences between schools accounted for close to 50% of the variation in student performance. In other words, in Germany, it very much mattered in which particular school you enrolled your child.

For many educators and experts in Germany, the disparities that PISA revealed were not entirely surprising. But it was often taken for granted – and deemed beyond the scope of public policy to change – that disadvantaged children do badly in school. What was shocking about the PISA results was that they showed that the impact of socio-economic status on students and school performance varied considerably across countries, and that other countries appeared to reduce that impact much more effectively than Germany did. In effect, PISA showed that improvement was possible, and provided the necessary spur for change. PISA helped establish a new attitude towards evidence and data in Germany. Germany virtually doubled federal spending on education in the early 2000s. But beyond money, the debate inspired a wide range of reform efforts in the country, some of which have been transformative. Early childhood care was given a stronger educational dimension, national education standards were established for schools (something that had been hard to imagine in a country where the autonomy of the *Länder* [states] had always been sacrosanct), and greater support was given to disadvantaged students, including students with an immigrant background. Nine years later, in 2009, Germany's PISA results looked much better, showing significant improvements both in quality and equity.

Germany was not the only country that improved its education system in a relatively short time. South Korea's average performance was already high in 2000, yet the Koreans were concerned that only a narrow elite had achieved levels of excellence in the PISA reading assessment. Within less than a decade, South Korea was able to double the share of top-performing students.

A major overhaul of Poland's school system helped to reduce the variations in performance between schools, turn around the lowest-performing schools, and raise overall performance by the equivalent of more than half a school year. Portugal was able to consolidate its fragmented school system and improve overall performance, as did Colombia and Peru.

Of course, international assessments have their pitfalls. Designing reliable tests poses major challenges. The criteria for success have to be defined in ways that are both comparable across countries and meaningful at the national level. Tests must be carried out under the same conditions to yield comparable results. Beyond that, policy makers tend to use the results selectively, often in support of existing policies rather than as an instrument to explore alternatives. But they provide an important opportunity for improvement.

Just before the results from the latest PISA assessment were published in December 2016, people from all over the world called me to find out what the major surprises in the global PISA league tables would be. But there are no surprises in international comparisons like PISA. Quality and equity in education are the results of deliberate, carefully designed and systematically implemented policies and practices. In the face of evidence from PISA of the rapid improvements that some school systems have made, even those who claim that education can only be improved on a geological timescale, or that the relative standing of countries mainly reflects social and cultural factors, must concede that it is possible to improve education systems.

It is time that we ask ourselves: What can we learn from the world's most advanced school systems? How can their experiences help students, teachers and school leaders in other countries? How can politicians and policy makers draw upon lessons from countries facing similar challenges and make better-informed decisions? Even when there are international examples to follow, why has it often proved difficult to learn from them and stop repeating the same mistakes? Such questions have never been more urgent to ask – and answer.

Critique of the OECD Global Competency Measure

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Summary

This article critiques the Global Competency measure the Organization for Economic Co-operation and Development (OECD) introduced in 2018. Using critical discourse analysis and social network analysis to examine the measure presented by the OECD, it is suggested that the measure is predominantly Western and serves to define global competency in terms of the cultural capital of a Western global elite. Revision of the measure is proposed, using the 5Ps of policy – philosophy, people, power, process, place – as a framework

Keywords

Global competency
PISA
OECD
Critical discourse analysis
Social network analysis

The Organization for Economic Co-operation and Development (OECD)'s Program of International Student Assessment (PISA) measures compares literacy, math and science achievements among 15-year-olds from various countries (Fig. 1). In 2018, OECD introduced a new measure – to compare how well each education system creates globally competent students. Following OECD's 2030 Framework, the new measure marks the world's first large-scale attempt at gauging how education systems address global competencies of 15-year-old students. This is a noteworthy addition because any measure carrying OECD's brand has the reputational capital to inform policy decisions and public opinion.

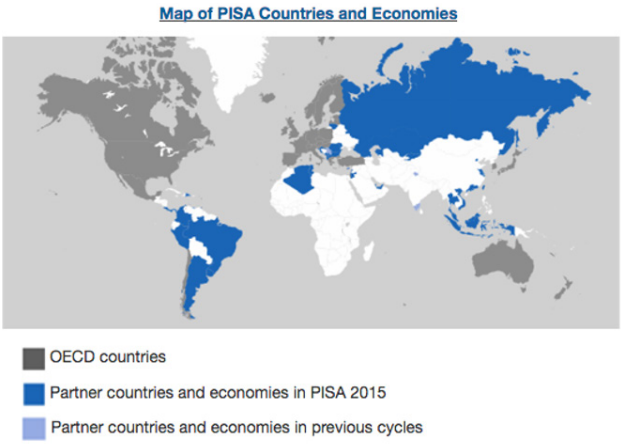


Figure 1. World Map of OECD Countries and PISA participants (www.oecd.org)

With 80 countries that account for 80% of the world economy potentially being tested, the global competency measure could have a significant impact on education policy and practice nearly worldwide. Yet given its importance, not all countries are carrying into effect the test with several countries opting out of

implementation, most specifically some of the most influential countries in the measure's design and construction (Ledger, Thier, Bailey & Pitts,2019). Losing highly influential and well-resourced nations such as England, the United States, Denmark, France, Germany and the Netherlands raises questions about the perceived quality of the OECD measure and rationales for not implementing the test.

This paper highlights the OECD's importance in influencing global policy directives in education whilst challenging and critiquing how it portrays, promotes, and measures 'global competency'. The OECD is a potent and growing authority in education, informing policy decisions, curriculum, pedagogy, and outcomes within globally diverse contexts and cultures. Since PISA's first appearance in 2000, the triennial battery of assessments has become increasingly recognized as a report card of a national system's ability to educate its students in reading, math, and sciences (Breakspear, 2012). The introduction of a global competency measure adds a layer of uncertainty and controversy to the original suite of PISA tests due partly to the lack of clear definition for global competency, the availability of more than 150 potentially related measurement tools, and the diversity of countries in which OECD is implementing. Given these factors, the global competency measure will not be without critics, its implementation not without complication, and its impact not without policy, practice, and research implications (Ledger et al., in press).

OECD used its *Global Competency for an Inclusive World* (GCIW) document to promote the new PISA measure (Ramos & Schleicher, 2016). This text became the target of our investigation as it represents how the OECD 'advertised' its new test to the world. We employed an uncommon methodological combination of critical discourse analysis (Fairclough, 2010) and social network analysis (Moser, Goenewegen & Huysman, 2013) to interrogate the GCIW policy text.

Five interdependent policy threads—referred to as the 5Ps: people, place, philosophy, processes, and power—provided a framework for understanding the implementation process, filtering discussions and framing recommendations (Fig. 2).

In this study, *People* relates to those who influenced OECD's text and assessment tool. *Place* relates to local settings for PISA implementation and assessment, as well as the broader global context within which OECD shaped the text. *Philosophy* refers to the beliefs and underpinnings embedded in the global competency discourse. *Processes* describe how the policy text, philosophies, people, and power are represented and processes are used for implementation. *Power* explores inequities embedded in the text and the power of language that provides agency for the OECD.

Figure 2: 5 Key policy threads (Ledger, Vidovich & O'Donoghue, 2016)

This new global competency PISA measure is the first foray into measuring a domain that is highly controversial, especially in many countries where nationalism has been or recently became politically noticeable. From a measurement standpoint, global competency has been defined variously (Deardorff, 2015; Torney-Puerta, 2002) and joins similar definitional debates surrounding citizenship education (Goren & Yemini, 2017). OECD cannot afford to promulgate a measure that causes uncertainty and or controversy.

The current paper is the first of a series of policy studies planned to capture the implementation process of OECD's global competency measure at significant moments in its life cycle.

Figure 3. OECD 2030 Framework, 2017

We aim to record the global implementation process from a collective 'outsider's' perspective. This initial paper focuses on OECD's GCIW document and how it portrays the knowledge, skills, behaviors, and dispositions for life in 2030 (Fig. 3). The study is timely for two reasons: It coincides with OECD's 2018 enactment of its new global measure; and it captures the initial wave of influential OECD nations opting out of the global competency measure, namely Denmark, France, Germany, the Netherlands, the United Kingdom, and the United States (Coughlan, 2018).

Losing these bellwether nations prompts questions about the perceived quality of OECD's measure. Curiously, some of the countries choosing not to adopt the new PISA test are those that contributed significantly to the research informing the GCIW and new global competency measure.

Findings

The OECD portrays a contradictory and concerning view of global competency in the GCIW and corresponding global competency measure. Our findings showed GCIW to make privileged assumptions about the ideals and experiences that would typify globally competent citizens within its text. Philosophically, GCIW defines global competency as 'a response to a changing world', ignoring students' and schools' abilities to change that world, whereas the OECD's 2030 Framework highlights the importance of agency and action.

GCIW states that: "If young people are to co-exist and interact with people from other faiths and countries, open and flexible attitudes, as well as the values that unite us around our common humanity, will be vital" (p. 1). Although this ideological outcome is commendable, further investigation of the text reveals contradictions to these goals. According to OECD, a 'globally competent person feels confident and happy about travelling to other countries' or 'having savored international cuisines' or 'donates money to charity' and has a 'home that can house exchange students'. Many of these examples of global competency would not necessarily be available to students from lower socio-economic backgrounds (Abdi, 2011). The assumptions about the ideal global citizen presented within the document exclude historically marginalized populations because those supposed ideals represent the wealth and privileges that typically characterize the global elite. (Howard, 2018). This contradiction violates the OECD model of global competency, which clearly specifies the importance of the local (Fig. 4).

The PISA global competency measure has two sections: a cognitive assessment and a background questionnaire built on scenario-based tasks (Schleicher, 2017). However, the GCIW text infers it is measuring student achievement and in turn, the effectiveness of the school curriculum and teacher training, all in a single assessment that only

Figure 4. OECD Global Competence Model

students complete. The following examples from the cognitive assessment and questionnaire sections highlight concerns about what is being measured and the embedded assumptions that underpin its items.

Students are expected to respond to whether they "participate in classroom discussions about world events" or "analyze global issues together with my classmate". The measure wonders if their teachers "have misconceptions about the history of some cultural groups" or "have lower academic expectations for students of some cultural groups". Students behaviors are interrogated regarding their choices of "certain products for ethical or environmental reasons even if they are a bit more expensive", their regular reading of "websites on international social issues" or participation "in activities promoting equality between men and women" or to reduce home energy use to protect the environment "by turning the heating down or turning the air conditioning up or down". Students are asked about their degree of awareness about "global health, global warming, migration, international conflicts, causes of poverty and equality between men and women in different parts of the world." These examples clearly highlight the test's embedded cultural and socioeconomic assumptions that heighten risk for bias.

Furthermore, the GCIW treats education as a reactive endeavor rather than a mechanism to create influencers of change. According to the GCIW, global competency is necessary "to counter the discriminatory behaviors picked up at school and in the family" (p. 2), blaming schools and families without considering problematic contributions from popular media and political discourse. Positioning students and families as needing change, rather than as agents of change, invite to concern.

Regarding *processes*, the GCIW gives little space to how students can achieve global competency: only 2 pages of the 44 devoted to schools or curricula. Excepting language and

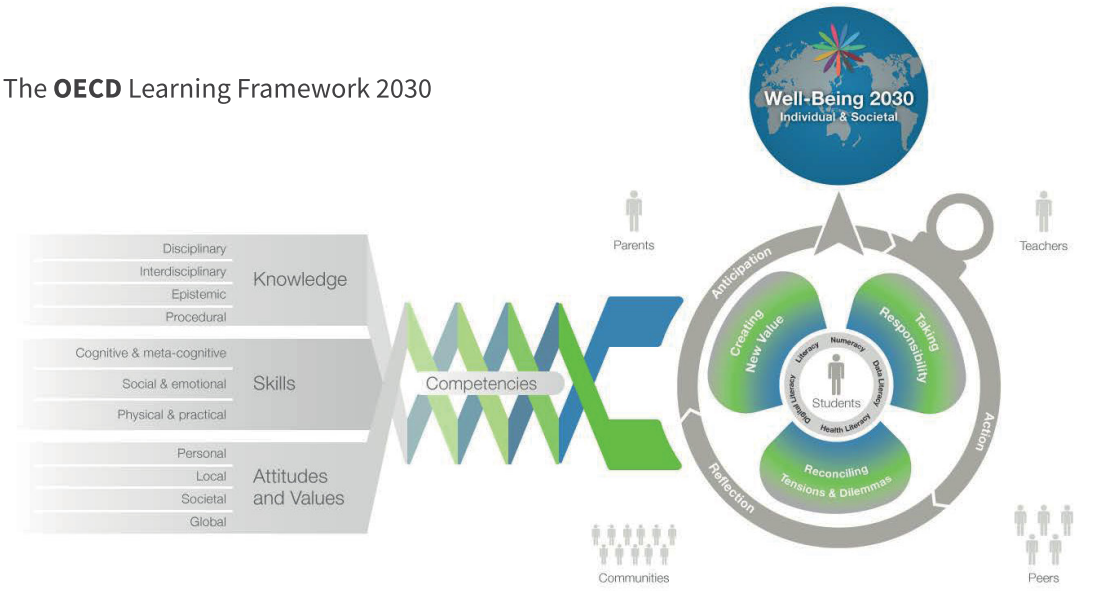
history, silence exists in the text regarding the role of schools in developing global competency. However, recent additions to the OECD website offer schools the *American Field Service Global Competence Readiness Index for Schools* (https://afs.org/) to determine starting points for global education. This index further reflects global elite practices such as international exchange as a predominate vehicle for the development of global competency.

Instead, the *people* who informed the OECD and GWIC showed through our social network analysis a dominance of government documents and peer-reviewed papers from a small set of individuals and associated models, including Deardorff (2015), Torney-Puerta (2002), Byram's (2012) Model of Intercultural Communicative Competence, Bennett's (2004) ethnocentric stages of development, and Donnelly (2007). An over-reliance on U.K. and U.S. input is concerning particularly given their historical roles in the world's most widespread colonial and neo-colonial impacts.

Recommendations

We shaped recommendations drawn from our findings around the interdependent policy threads known as the 5Ps (Ledger et al., 2017). The recommendations offer OECD a revision process for the global competency measure.

1. Re-examine and re-shape OECD's *philosophical* underpinnings and the way global competency is portrayed.
2. Consider which *people* were represented in the construction of OECD text and the impact it has on the *people* implementing the test.
3. Surrender the *power* of privilege to educators not bureaucrats; articulate global competency through a socially valid, peer-to-peer exchange, not a top-down mandate.
4. Ponder a *process* to shift the burden of change from students (individuals) to schools (community).
5. OECD and policymakers should partner to offer pedagogical support that accounts for *place* ensuring 'geography and place matters' (Green & Reid, 2014)



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Findings also suggest that OECD centered its understanding and measure of global competency on a limited range of perspectives, which contradicts the actual purpose of educating for global competency. Corresponding to our recommendations, this shift in the balance of influence among participating nations seems to create a vacuum into which non-Western and/or economically developing (i.e., non-OECD) nations can contribute. Critiquing OECD's first attempt at measuring global competency affords an opportunity to present recommendations that will assist in the construction of a subsequent iteration of the measure.

Conclusion

It is important to critique high-stakes testing regimes particularly within a global environment fixated by standardization of education reform (Zhao, 2016). It is even more important when policy decisions and public opinion will be impacted. Our five recommendations and call for further critique of the implementation process of the OECD's global competency initiative remains timely as the OECD unveils its 2018 handbook *Preparing our Youth for a Sustainable World: The OECD PISA global competency framework 2030* suite of corresponding policy documents and corresponding graphics (Fig. 5). Although we celebrate the inclusion of a non-curriculum measure in the PISA suite of

assessments, the power inequalities, privileged voices, and measurement ambiguities embedded in the policy, combine to raise concern about the new OECD global competency measure. The authors join the growing list of researchers including Labaree (2014) and Meyer (2014) to challenge OECD, policymakers, practitioners, and researchers to be reflective and expand the range of global voices that inform policy directions (Lingard et al., 2015). Such challenges are particularly pertinent for directives that can be as globally significant and influential as any measure bearing OECD's PISA label.

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The Impact of Global Reports on Education

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Summary

This article states that the global education reports of the main international organizations enjoy legitimacy and have played an important role in the international mobilization for education for all, but today they must redefine their added value in a connected world where they are no longer the only source of information. The diagnosis continues to be the lack of investment in data and analyses related to the education sector, as opposed to other sectors, for example, health. The introduction of new disciplines, including "hard" sciences, is an interesting development, although it is far from solving the fundamental question of the relationship between experts and opinion.

Keywords

World report
Education for all
Monitoring and evaluation
Data
SDG4

World reports, whether on education or on other sectors of international action, live in an ecological niche that gives them common features. They are produced by multilateral organizations according to their own codes and derive from the mandates and priorities of the international community. As such, they are beneficiaries and producers of the institutional legitimacy that is essential for their influence.

From a literary point of view, the genre is established: abundant volumes overflowing with statistics and references and offering arguments and recommendations that can be vigorous, but should avoid taking any partisan stance.

These global reports are levers of collective action, although rarely directly, despite some well-documented cases. Their aim is to promote national educational policies.

In the education sector, this ecological niche of global relations also includes similar species, such as international surveys on students' levels, educational goals defined at international, regional and national levels. Fortunately, cross-references and interspecies exchanges are not missing.

The ecosystem has its seasons or periods, which follow the annual rite of the release of each new edition. Hence, the impression of a déjà-vu, or of tiredness, may legitimately arise. It might even be a reason for a certain disappointment if a theme of the year is presented as new, when in fact a quick review of previous editions shows that it is an old concern.

These feelings are largely unfair because a more careful look shows that the coverage of topics, the quality of the information available and the universality of the issue improve markedly over time. Global reports now take the form of real windows open to a large number of statistical and text sources.

It can even be considered that this literary genre has matured. Hasty statements and other generalizations with abusive tendencies have diminished thanks to reinforced editorial and editing controls. On the other hand, the efforts in simplifying the language and the innovations in infographic facilitate

more and more the reading which, in spite of all these efforts, continues being tough.

Now it is time to review the barriers that limit the greatest impact. The idea here is to examine how this ecological niche, which is both the condition of existence and legitimacy of global education relationships, could be more threatened than it seems. And how multilateral organizations should adapt themselves to this ecological niche's environment.

Reaffirm the Role of Data Mobilization And Analysis

The first evolution can be interpreted as good news - the target audience is today bombarded by a constant flow of information that contrasts with the situation of relative deficiency at the time of the first important reports that emerged after the Jomtien Conference on Education for All in 1990. Except in industrialized countries, there were then real gaps in data, especially qualitative data, on the state of education in the world. However, the data and analyses available were sufficient in number to indicate the alarming relative, and sometimes absolute, decline of schooling levels in many developing countries. The global reports which revealed the scope of the problem undoubtedly played a very important role in mobilizing the international community.

But the impression of abundance, multiplied by new forms of communication, can be misleading. In comparison with other sectors, the diagnosis is that there is still a deficit of data in education. Especially when compared to the health sector, in which since the adoption of the Millennium Development Goals in 2000, the international community has made efforts to improve statistics and evidence. For example, Birger Fredrikssen and Nicholas Burnett (both Senior Fellows at Results for Development), in recent interventions, warned about the evident lack of investment in global public goods in education, including data production. The international expenditure on producing statistics or knowledge in the education sector is estimated at 3%, compared to 21% in the health sector (Burnett, 2017). Some people establish a causal connection between this data deficit, which can make the investments made blind, and the reduced capacity of education to mobilize international aid to the required levels.

Therefore, unlike what a simple optical effect might suggest due to the ubiquity of information in a digital world, there is no overflow of data, validated and useful analysis on the subject of education, but on the contrary, there is a persistent and quantitative deficit of knowledge that affects the set of objectives and contexts. There is also an ontological deficit that should be questioned.

A Possible Overcoming of the Opposition Between "Hard" and Social Sciences.

One of the limitations often mentioned with respect to the relation of education to the production of data is its whole, or almost, belonging to the field of social sciences and public policies. In comparison with the reports of the Intergovernmental Panel on Climate Change (IPCC) which enjoy a greater reputation for the contribution of hard sciences (physics, chemistry, among others) and the disciplines (i.e. climatology, ecology) that are associated with them, the education sector, in one form or another, suffers from a minor separation between scientific evidence and opinions. Even within the social sectors, global reports on health have a reputation for being more scientific than those addressing education, and public policy priorities seem to rely more on diagnoses from more recognized disciplines, such as medicine or epidemiology.

That explains the shake experienced in the educational community in recent years, in which an advance in neuroscience and development biology supported the successful promotion of early childhood education (Álvarez, 2016). The pioneers -in the consideration of the results of these sciences- in the field of educational policies, such as Helen Abadzi, today see not only their recognized contributions but also their recommendations translated into public policies. The global reports have not been insensitive to this reevaluation. It can be seen, especially in the 2018 edition of the World Bank's World Development Report, the advances supported by magnetic resonance imaging of the brain. It is a remarkable movement that is leading to a meaningful renewal.

However, this contribution of the hard sciences is only partial. With regard to early childhood education, resorting to neuroscience is useful in advocacy and in pedagogical practices but does not erase questions outside the strict field of hard science, starting with the choice, financing and execution of new defined political priorities.

In the end, despite these renewal factors, the diagnosis continues to point to a lack of investment in knowledge in educational systems when compared to other sectors, with no convincing justification for this state of affairs. How to work for global reports to achieve a greater impact on education, and how to increase their capacity to mobilize and guide efforts?

The Hypothesis of an Overestimation of the Consensus On the Global Education Goals

The initial idea is that the increase in the financing of data, research and specialized knowledge on education should be accompanied by a response to what appears to be the decrease in the marginal return of this financing, not from the data and analyses volume or quality point of view, but of their capacity to be accepted and taken into account in the public debate.

The philosopher and sociologist of science Bruno Latour, in his analysis of the denial of climate change, defines the problem: "Although the evidence [in support of the reality of climate change] has been overwhelming since a long time ago, some scientists continue to believe that the problem of their denial can be solved with more and more data and more education of the public " (Kofman, 2018).

According to Bruno Latour, "[it would be naive to believe] that scientific facts can act according to their just precision". Therefore, it is important to be interested in the way in which "local values and circumstances" (Kofman, 2018) of those to whom they are addressed, may or may not make the facts and analyses perceptible, no matter how rigorous they are. There is no fatality, as shown by the great reports that have had a lasting impact on the very definition of the terms of the debate on educational policies. For example, in the United States, the Coleman report of 1966 found audience and resonance when the 1964 Civil Rights Act was enacted. At the international level, the Delors Report (1999) contributed to a general economic and social evolution, in a context marked by high rates of unemployment.

These reports are not based on the principle of the existence of a consensus on issues of equality, rights or missions assigned to education. These reports redefined these issues in the long-term.

Obviously, it is not a matter of allocating to the global education reports of international organizations, especially those on an annual basis, an objective of perpetual reconstruction of sustainable development goals or the 2030 Agenda. Rather, it is necessary to find the "local values and circumstances" that prevent the reception of these reports and, incidentally, to extract the consequences in terms of content and format.

Indeed, it is useless to accumulate in hundreds of pages the statistics related to the maintenance, or even the worsening of inequalities in education and opportunities, in relation to two types of attitudes: on the one hand, the hostility, assumed or not, of some value systems towards international objectives; on the other hand, skepticism, even among those who are better instructed, towards the ability of public action to change real situations. Probably, powerless to change the first attitude, national reports have instead the vocation to contribute to change the second.

All this is not new. We must continue tirelessly to determine the concrete options to achieve international goals and, with the most varied examples of options and strategies, fight against skepticism towards the alleged inability of public policies to change the status quo. Much of this response is still to be built.

Endnotes

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Governance by Assessment Data: How Far Does It Go?

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Summary

The article looks at how large-scale international assessments exercise soft power in global education governance. It argues that although learning data can inform education policies in meaningful ways, there are risks that international partners and governments need to consider when using it, especially in developing countries.

Keywords

Use of learning assessment data
Global education governance

From Descriptive Statistics to Comparison-driven Policies

The number of countries conducting national, regional and international large-scale student assessments has significantly increased over the past two decades (UNESCO, 2015). There has been strong international support for this expansion. Multiple international actors have highlighted that possessing and effectively using reliable learning assessment data is essential to diagnose the health of the education sector, design appropriate strategies, trace hidden exclusions, foster stronger political engagement as well as reduce system inefficiencies (World Bank, 2018; UIS, 2017). While these data hold strong potential to inform decision-making for improved education policies, their use as centerpieces of policy is not a neutral technical exercise. It may considerably shape how education systems are analyzed and ultimately which aspects receive policy-makers' attention (Breakspear, 2014).

The role and influence of international student assessments in global education governance have been evolving over time. In the 1980s, international education statistics produced by the United Nations Educational, Scientific and Cultural Organisation (UNESCO) received strong criticism for their descriptive nature. They did not provide country rankings on different indicators and although data were methodologically sound, related publications did not engage in a more complex statistical analysis correlating systems' inputs and outputs (Cussó and D'Amico, 2005). Organisations such as the Organisation for Economic Cooperation and Development (OECD) and the World Bank, mainly under pressure from the United States, insisted on the need to generate more comparative data about learning and analyze the underlying political reforms (Cussó and D'Amico, 2005). The OECD itself experienced an evolution in its evaluation culture shifting away from the skepticism regarding international educational performance comparisons toward embracing them. This quest for comparative data was facilitated by a context in which education was quickly becoming a way to measure countries' economic potential (Addey et al., 2017). Education had become a global currency of knowledge economies

crucial to demonstrate countries' comparative advantage (Addey et al., 2017).

The growing influence of international large-scale learning assessments is therefore strongly driven by international comparisons that might provide a distorted view of reality, as they are ranking countries with varying level of resources. Setting international standards through comparisons that put peer pressure on those being ranked is a strong tool to exercise influence (Martens, 2007). However, countries in league tables have different means at their disposal and varying technical capacities, which might distort the comparison: 'cultural, contextual, and organizational characteristics prevent straightforward cross-national comparison of student achievement (Wiseman et al., 2010: 12)'. It is an important element to consider when relying on international comparative data.

The Legitimacy that Hard Data Represent

As a high level policy actor in Uruguay recently said, 'anything is legitimated as long as you start your sentence with 'PISA says…'
(Addey, 2018).

The analysis of learning assessment data and recommendations that follow are increasingly used as a strong tool for legitimizing education reforms. The needs of this data are often perceived as an objective reality not subject to contestation and this constitutes a strong argument for policy-makers (Cussó and D'Amico, 2005). This scientific approach to policy-making is one of the main drivers of OECD's success. Policy-makers and the general public accept PISA as a legitimate proxy for education system performance (Breakspear, 2014) and the organisation enacts soft regulation through its publications, studies, reports and international comparisons that have a high reputation in terms of the quality of their analysis (Morgan and Shahjahan, 2014).

However, policy-makers can use learning data to support decisions made on other grounds. The use of assessment data sometimes appears as a solution in search for the right problem, justifying political agendas already in place (Fischman et al., 2018). Baird et al. (2011) use an example of France explaining that in the past its government exaggerated the country's poor performance in the Programme for International Student Assessment (PISA) to justify its foreseen reforms refocusing on fundamentals with an emphasis on literacy and science. In Uganda, there is some evidence that the government is also using UWEZO assessment data to support its agenda, as low assessment results were used to refuse higher pay to teachers (Elks, 2016). In these situations, a political decision precedes recommendations coming from data analysis, which reduces its ability to effectively inform education policies.

Definition of Education Goals through Measurement

'What we choose to measure in education shapes what we collectively strive to achieve'
(Breakspear, 2014, p. 4).

What is measured in education systems matters, as this is likely to influence the way governments approach education reforms. Using an example of PISA, Breakspear (2014) argues that policy-makers start using PISA lenses to examine their systems and this is likely to influence the definition of the end-goals of education. Meyer and Benavot (2013) share this view noting that PISA does have a potential to create changes when it comes to goals and organisation of national education systems. Changes in the curriculum are the most explicit examples of this influence. Multiple countries (e.g. Korea, Mexico, Greece, Luxembourg) revised their curriculum to align it to PISA framework and to include competencies that PISA tests (Breakspear, 2012).

There is, therefore, a risk of narrowing down education system goals to the improvement of a set of international indicators. While they can provide useful information on student performance in certain areas, they cannot be equated to the purposes of the education systems (Breakspear, 2014). The definition of the end-goals of education requires broader democratic deliberation: 'the discussion of educational end-goals involves ethical deliberation about what matters in education and what an educated person should be' (Breakspear, 2014, p. 11). Likewise, Biesta et al. (2007, p. 18) explain that 'a democratic society is precisely one in which the purpose of education is not given but is a constant topic for discussion and deliberation.' However, international large-scale assessments tend to reduce this democratic space by putting pressure on countries to improve their scores in a set of comparable indicators.

Increasing External Pressure on Developing Countries

New US government policy mandates the State Department and USAID to demonstrate increases in the "percent of learners who attain minimum grade-level proficiency in reading at the end of grade 2 and at the end of primary school" in countries receiving US support. With an $800 million international basic education budget on the line, there are high stakes around how "minimum grade-level proficiency" is defined and measured
(Bruns, 2018).

Developing countries are under increasing pressure to participate in international large-scale assessments as their participation is often related to development partners' aid conditions. Financing agencies ask for learning data as a

valuable benchmark to evaluate education progress (Addey et al., 2017). Recognizing this role, the Global Partnership for Education (GPE) included the availability of learning data (or a strategy to improve this availability) as a requirement in its funding model (GPE, 2017). Moreover, countries also use assessment data as evidence to obtain financial resources for projects aiming to increase student results (Addey et al., 2017; Shamatov & Sainazarov K., 2006). Using empirical evidence, Kijima and Lipscy (2016) show that participation in international learning assessments is actually associated with an increase in foreign aid inflows to education.

In addition, participation in standardized learning assessments allows demonstrating countries' adherence to global education values (Knight et al., 2012). The Education 2030 Agenda emphasizes both the importance of improved learning outcomes and their measurement, which is strongly supported by development partners (GPE, 2017; World Bank, 2018). Participation in assessments is therefore valued as a process itself that represents support to international standards (Addey et al., 2017).

Although learning data can inform education policies in meaningful ways, its growing influence in global education governance has not been accompanied by a systematic study of risks that its use implies. Such risks are crucial to explore to make the best use of the potential that learning data hold to improve education policies. A new UNESCO International Institute for Educational Planning (UNESCO-IIEP) research project on the use of learning assessment data will provide new insights into some of these aspects. It will explore how learning data are used in a number of Sub-Saharan Africa and Latin American countries in the education planning cycle, analyzing elements linked to the political economy of actors.

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Part 2

How to Improve These Reports?

Global Monitoring of the Seven SDG4 Targets for Sub-Saharan Africa: The Imperative of Prioritizing Universal Basic Education

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Summary

The article considers that the risk of undue impact of global monitoring on national policies is more serious for the seven SDG4 targets than it was for the Education for All (EFA) goals and education Millennium Development Goals (MDGs). In Sub-Saharan Africa (SSA), a region where high levels of out-of-school youth and youth illiteracy coexist with rapidly growing unemployment, the priority for countries -and for global monitoring- must be to achieve a universal cycle of quality 8-10 years of basic education by 2030. If not prioritized, it risks to further weaken the rights and political voice of those missing out on even basic literacy.

Keywords

Sub-Saharan Africa
SDG4
Universal basic education
Informal sector
Youth employment

Previous NORRAG studies have reviewed the impact of global education reports on factors such as: national policies; domestic and external resource mobilization and allocation; research and data-gathering priorities; and global education governance[2] (King, 2017). While there is little hard evidence on this issue, I believe that there is quite a wide consensus on that most such reports are very useful. The benefits include stimulating more evidence-based national and global advocacy, policy debates, and decision-making. In turn, this promotes more effective domestic and external resource mobilization and utilization. Concerns include how to ensure that national use of global "good-practice" knowledge adequately reflects local conditions, and whether monitoring of what might be considered global concerns unduly affects national policies.

The below discussion is limited to the global monitoring function of these reports and focuses on Sub-Saharan Africa (SSA). It argues that, while such monitoring in the past likely impacted national policies regarding the Education for All (EFA) and two education Millennium Development Goals (MDGs), there was little cause for concern about "undue" impact compared to the monitoring of the seven targets for the education Sustainable Development Goal (SDG4). This is because the EFA and MDG goals were largely limited to universal primary education (UPE), adult literacy and equity in access, i.e., goals recognized as **basic human rights** in the 1948 Universal Declaration of Human Rights. Thus, prioritizing among them was not an issue: they should all be met. A case in point: the increased global monitoring of girls' education over the last three decades has no doubt helped enhance gender equity (UNESCO, 2015). Most would find that very positive.

A similar argument cannot hold for the SDG4 targets for SSA since most countries cannot reach all seven by

2030. Nor should they be expected to. They must prioritize among them, and so must global monitoring exercises. If not, such monitoring will further enhance the voice of better-off populations seeking publicly funded post-basic education over the rights and voices of poor people who have little political clout and who miss out on even basic literacy, as well as other basic services such as health care, food security, electricity, and roads. This risk is especially high in SSA, where high levels of out-of-school youth and adult illiteracy coexist with rapidly growing unemployment among secondary and higher education graduates. To illustrate, in Ghana - with a tertiary Gross Enrolment Ratio (GER) of 16% (double the SSA average), less than 2% of the about 250,000 tertiary graduates joining the labor market annually find modern sector jobs (Ansu, 2013).

While SSA has made good progress in access to primary education since 2000, dropout remained high and learning outcomes low. As a consequence, the region's backlog in basic education development compared to other regions increased. For example, in 2016, SSA had 47% of the world's illiterate women aged 15-24 years (up from 29% in 2000) and 54% of the world's out-of-school children (41% in 2000). Given SSA countries' particularly difficult demographic, education, and economic challenges (highlighted below), they must prioritize universal basic education (UBE) -- here defined as completion of 8-10 years of basic education, and at least universal youth literacy. If not, even UPE (not even a separate SDG4 target) will remain a moving target; it shifted from 1980 (agreed in 1961 in Addis Ababa) to 2000 (Inter-Agency Commission for the World Conference on Education for All, 1990), to 2015 (UNESCO, 2000), and now to 2030[3].

Clearly, SSA countries must develop the post-basic education skills needed to support national development. But the labor market for such skills is almost nil in economies where 80-90% of the workforce is in the informal agricultural and non-agricultural sectors and where the economic transformation is still very slow (AfDB, 2018). In this context, giving top priority in global monitoring to achieving UBE by 2030 is warranted on both equity and economic grounds. This would be in line with the "progressive universalization" of education followed by all other regions and called for by the 2016 Education Commission Report, i.e., UBE must be reached before prioritizing publicly-funded post-basic education beyond what can be justified by national development needs (International Commission on Financing Global Education Opportunity, 2016).

There are at least five major interrelated reasons why a failure to prioritize UBE in the global monitoring of SDG4 for SSA may slow down progress towards this goal:

1. **Despite impressive gains in access to primary education between 2000 and 2016, SSA's youth and adult literacy rate barely improved.** The youth literacy rate (15-24 years) grew marginally from 72% for 2000-2007 to 75% for 2010-2016 while the adult literacy rate (15 years and above) grew from 62% to 65% (weighted averages) (UNESCO, 2017). This reflects: (i) High dropout: Only three out of five entering primary school reach the final grade (largely unchanged since the 1970s); (ii) Poor learning outcomes: Fewer than half of those completing primary school achieve basic literacy and numeracy; and (iii) Lack of second chance programs: There is minimal domestic and external funding for adult literacy programs and for youth missing out on primary education. SSA's current dismal performance in providing basic education for all hurts particularly the poor, women, and the majority of the 80-90% employed in the informal farm and household enterprise sector.

2. **From 2015 to 2030, SSA will need much higher growth in education funding to reach UBE than other regions.** This is because of the massive catch-up growth needed, accentuated by the projected one-third increase in the population of school-aged children between 2015 and 2030 (all other developing regions will see a small decrease). And, even disregarding the added pressure created by the ambitious SDG4 post-basic targets, social demand for post-basic education will increase sharply, given that in 2015, SSA's GER was only 35% in upper secondary and 8% in tertiary education (UNESCO, 2017)

3. **The sharply increased funding must be mobilized in a much more challenging context than it was during most of the 2000-2015 period.** A combination of resumed economic growth (stimulated by the commodity boom), a growing share of the Gross National Product (GNP) devoted to education, and increased education aid led to a much faster annual education budget growth between 2000 and 2014 (4-5%) than between 1980 and 2000 (only about 1%)[4]. The main factor determining this difference was economic growth: while the Gross Domestic Product (GDP) per capita declined by about 0.7% annually between 1980 and 2000, it grew by about 2.7% annually between 2000 and 2015. Growth accounted for about two-thirds of the rise in education budgets during the latter period[5].

   Economic growth will become an even more important determinant of education budgets over the next decade. The participation of education in public budgets in SSA (17% in 2016) already exceeds the average for developing countries, and there are many urgent demands for non-formal education of the SDGs in those. And, even with an increase in 2016, education aid stagnated globally between 2009 and 2015. Further, despite being home to

more than half of the world's out-of-school children, SSA's share of aid for basic education has declined sharply, from 40% in 2009 to 24% in 2016.

4. **But medium-term growth prospects are not encouraging.** SSA's GDP per capita grew by only 0.9% in 2015 and declined by 1.3% in 2016. The International Monetary Fund's (IMF) October 2018 Economic Outlook estimates zero per capita growth in 2017 and projects 0.5% in 2018 and 1.1% in 2019. If this near-stagnation in per-capita growth over the period 2015-19 were to continue for several years, this would severely limit the fiscal space for education funding. In addition, low growth would severely limit modern sector employment opportunities. The African Development Bank's (AfDB) 2018 Africa Economic Outlook estimates that the average elasticity of employment to GDP growth for SSA is only 0.41. And SSA's labor force is estimated to grow by 2.7% annually between 2015 and 2030. Thus, the economy would have to grow by at least 6.6% annually just to absorb workforce growth. This is double the 3.2% average growth (0.5% per capita) from 2014 to 2016 and projected for 2017-2019 (3.4%).

The main causes of SSA's slow growth have no easy short-term fixes. They include poor infrastructure, chronic power shortages, poor business climate and, in many cases, increased insecurity. They also include decades of neglect of agriculture (ACET, 2014; AfDB, 2018; APP, 2014), a sector that was three times more effective in reducing poverty in China between 1980 and 2011 than growth in any other sector. Similar magnitudes are found for some SSA countries (UNESCO, 2016). These constraints on growth are accentuated by very poor basic labor force skills, especially in the rural sector where, in most countries, 50% or more of the labor force is illiterate. Even in middle-income Nigeria, in 2011 86.5% of those employed were in the informal farm (57.6%) and non-farm sector (28.9%) as much as 33% of the labor force had never attended school, reaching 45% in agriculture.

Basic skills upgrading is imperative in order to accelerate the transformation from dual economies where 80-90% of the labour force is engaged in low productivity informal sector activities, to economies where growth is driven by rising productivity in such activities as well as growth in the manufacturing and modern service sectors. Over the last three decades, manufacturing's share of employment has stagnated at around 6%, and the informal sector remains the employer of last resort for the majority of young people whatever their level of education.

5. **Tighter budgets will make the political economy of prioritizing UBE even more difficult than in the past.** Population groups missing out on UBE have much less political clout than those seeking entry to post-basic education, whose voices are now reinforced by the global call for – and monitoring of -- universal completion of upper secondary and access to tertiary education. It is time to reset education priorities in SSA in favor of the large population groups and economic sectors that benefit little from education spending (including aid). And this resetting of priorities must be reflected in the global monitoring of the seven SDG4 targets.

In conclusion, failure by SSA countries — and the global community — to prioritize UBE would have serious consequences. In particular, it would likely mean that one-third of SSA's labor force would remain illiterate in the 2030s, and more than one-third of children would be born to illiterate mothers. The former would seriously impede productivity growth and associated urgently needed transformation of the informal sector to accelerate economic growth. In turn, that would negatively impact progress towards most non-education SDGs. The latter would reinforce the inter-generational vicious cycle of poverty, low health and education status, slow demographic transition, and marginalization (UNESCO, 2010).

Failure to better align education funding with basic skill requirements and equity concerns will be felt beyond national borders, including through increased economic migration. Between 2015 and 2030, the age-group 15-24 years is projected to grow by 48% in SSA compared to 4% in South Asia, and decline by 4% in Latin America and 9% in East Asia. The extent to which this huge, young workforce becomes a "demographic dividend" will hinge on whether young people have the basic skills and opportunities to become productively employed (Canning, Raja and Yazbeck, 2015). This is a massive challenge, one that calls for urgent collective global action. Indeed, for global monitoring to have a real purpose – beyond shaming countries that do not reach all SDG4 targets – the global community should increase its financial support for countries that show political will to prioritize attaining UBE by 2030. Achieving UBE is a **basic development stage that no country can "leapfrog"**.

Endnotes

1. Former director for Human Development in Africa, the World Bank.
2. NORRAG News (NN) 43, February 2010, reviews such reports, NN51 (December 2014) explores their impact on global education governance, and K. King (former NN editor) discusses challenges in monitoring global goals in: "Lost in translation? The challenge of translating the global education goal and targets into global indicators" Compare, 47(6):1-17. July 2017.
3. Before the two education MDGs for 2015 were adopted in 2000, and before the targets for UPE were adopted, first in 1990 in Jomtien, Thailand, for 2000, and then in 2000 in Dakar, Senegal, for 2015, regional targets for UPE were agreed at four regional UNESCO conferences in, respectively: Karachi, Pakistan, in 1960 for Asia; Addis Ababa, Ethiopia, in 1961 for SSA; Santiago, Chile, in 1962 for Latin America; and Tripoli, Libya, in 1966 for Arab States. The target year was 1970 for Latin America and 1980 for the other regions. For a review, see Fredriksen, B. (1981).
4. Estimated by author. The slow growth was mainly driven by the decline in GDP per capita noted above, reinforced by a decline and later stagnation in the share of GDP allocated to education: 4.5% in 1980, 3.5% in 1990, and 3.4% in 2000 (median values). Data for 1980 from World Bank (1988). Education in Sub-Saharan Africa. Washington D.C. The World Bank. p. 138 and for 1990 and 2000 from UNESCO (2003). EFA Global Monitoring Report 2003/4. Paris. UNESCO, p. 382.
5. Estimated by author based on GDP growth and change in share in GDP allocated to education.

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Beyond Educational Quality: The Battles to Come

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Summary

This article argues that global education monitoring reports such as UNESCO's Global Education Monitoring Report, The World Bank's World Development Report and the OECD's Education at a Glance, and learning assessments such as PISA, LLECE, TIMSS and PIRLS, provide internationally useful and comparable information. However, these instruments also define a global education agenda that proposes "quality of education" as the only solution for education issues. Cases like the Mexican one, addressed by the author, show that this quest to improve quality is not the solution in an unequal society. Issues like inclusion of disadvantaged groups into education and their retention and reintegration into education systems could be more relevant.

Keywords

Evaluations
International assessments
Mexico

Global education monitoring reports (GEMRs) and learning assessments such as PISA, LLECE, TIMSS and PIRLS, fulfill very important goals for educational progress at the national and international levels. The fact that their shared assumptions and educational policy recommendations are distant from national realities, coupled with the *backlash* against globalization in a growing number of countries, however, presents a scenario that requires the global education agenda to expand beyond quality education, evaluation and accountability.

International Tests, GEMRs and a Single Global Education Agenda

One of the most important contributions of international tests and GEMRs is to offer reliable and comparable information on a regular basis about the organization of education policy efforts in different countries, looking at actions undertaken by governments and social actors in education (in particular in formal education), and the diverse outcomes of national education systems.

In addition to providing useful information about the evolution of national education systems over the years, in a comparative approach, large-scale standardized tests, in conjunction with the GEMRs, have shaped a universal education agenda. In other words, they have shaped a unique agenda that defines, from the global level, the central education issues and problems, the priorities to be addressed, the data and metrics that are relevant and valid, as well as many of the strategies and tools that are considered to be useful in addressing common and/or analogous challenges.

Since the 90s, and especially since the first decade of the 21st century, the global education agenda to which GEMRs and international learning assessments have contributed to shape has become the conceptual, analytical and informational basis for the dominant discussion on education and its policies. This has been visible not only in education debates at the international level, but also at the national level, in an increasing –and more diverse- number of countries.
Such an agenda covers a wide variety of topics and issues

and is not exempt from disputes. Fundamentally, however, this dominant agenda has been prioritizing for several decades the issue of quality education, and requiring and relying on the regular production of data and indicators. It has also been based on some fundamental premises such as the importance of quality education as a driver of economic growth and international competitiveness, and the centrality of basic cognitive learning — language and mathematics — in the definition of "quality education". In addition, the agenda has been based on the understanding that regular and rigorous assessment of learning and of other education systems' elements, together with accountability mechanisms, constitute two of the most powerful tools available for societies to make progress in quality education.

Sharing a common language has contributed to facilitate not only global dialogue in the education field but also cooperation among an increasingly larger number of countries. On the other hand, the priority given to quality education, quantitative indicators, evaluation and accountability has had effects that, combined, contributed to reshape education policies' directions in many national contexts. Among these effects, the following stand out:

First, the transition towards education policy agendas that give very high and even maximum priority to increase the quality of students' learning. In many cases, this new priority has remained on the discursive level. In a relevant number of countries, however, the focus granted to quality education has been reflected in legal, institutional, and organizational changes. In many of them, this has incurred in less importance being granted to other issues, most notably that of access to education.

A second effect, which has helped to consolidate the adoption of the global education agenda nationally, is the growing importance that a number of national governments with very different educational, social, economic and political problems, as well as different institutional development levels and capacities, have given to participate in international large-scale learning assessments, as well as to develop and apply national standardized tests. This effect has been accompanied by the creation or strengthening of assessment-dedicated divisions within the government departments agencies in charge of managing the national education system.

A third and very important consequence refers to the shift towards quality education and educational assessments within the national level education policy. This has to do with the rising influence of international organizations responsible for producing GEMRs and international assessments, as well as with the expansion in participation and importance of non-governmental actors, civil society organizations (CSOs), private sector and specialists, in the discussion and collective decision-making regarding education.

Brief Notes on the Mexican Case

In the Mexican case, as occurs in several other cases within and outside Latin America, the reordering of priorities in education policy, in combination with a multiplication of non-governmental actors with interest and ability to influence the government's education agenda, has produced considerable benefits. Among them, it should be mentioned, its direct contribution to increasing the visibility of the low quality of learning of Mexican students which generates favorable conditions for implementing initiatives and reforms focused in improving the quality of education.

Other important benefits include the generation and public availability of more and better information on the functioning and results of the Mexican education system; the development of highly specialized personnel and significant technical skills in the area of educational assessment; progress in building a system of accountability in this area; and the emergence of a more nurtured and informed public debate on education.

The way in which GEMRs and international and national learning assessments have been used in Mexico has not always been the most adequate to effectively contribute to improving the performance and results of the Mexican education system. Partly because of this, until now and with few exceptions, the growing influence of these resources in the debate and in education policy has not been translated into concrete and meaningful benefits for Mexican students. Instead, it has resulted in a number of adverse outcomes.

Among the deficiencies that have characterized the use of GEMRs and learning assessments in the Mexican case is the trend at national and local level to give greater attention to diagnosing and evaluating the students' learning outcomes (using the valuative, conceptual and analytical lenses implicit in these tools), rather than promoting the construction of –human, technical, institutional and material capacities- to improve quality of education.

There are, certainly, exceptions. At the national level, the most important and ambitious was the education reform promoted from the end of 2012 to 2018, which, both technically and discursively, was based on the global education agenda in which GEMRs and international learning assessments play a big role. This reform focused much of its energies on two central issues. First, in breaking a long-standing scheme of complicity between education authorities and union leaders organized around clientelism and corporate control of teacher positions, salaries and trajectories; subordinating –again- teacher unions to the government, and transferring the

control over education policy back to the federal government. All of these actions were based on the introduction of a system that allowed managing access, promotion and separation of teacher duties based on evaluation. Second, the education reform focused on the constructing and/or on the strengthening of institutional, technical and human capacities to promote better learning, as well as to renew curricula and pedagogical approaches. This second focus, that comprised a wide range of actions, was included in the design and implementation of what was called the "New Education Model" (*"Nuevo Modelo Educativo"*).

Unfortunately, all this effort failed in being translated into tangible advances in educational quality and into a sufficiently large number of allies and beneficiaries to ensure continuity over time. What the reform did achieve, however, was to produce a considerable and widespread discomfort within the organized teacher union. This proved to be disastrous for the reform, as it paved the way for the electoral triumph of the presidential candidate Andrés Manuel Lopez Obrador, who made the cancellation of the education reform, initiated in 2012/13, one of his main campaign promises.

Many factors contributed to the collapse of this reform that was among the most clearly aligned with the global education agenda influenced by the GEMRs and the international learning assessments. Among those factors are, surely, failures in the political process of the reform, serious deficiencies in the implementation phase and insufficient maturation time.

For a Broader Agenda

Standard explanations of the limitations or failures of reform efforts influenced by the dominant global agenda (i.e. achieving quality learning) often emphasize flaws or obstacles at the level of the political processing. In other words, when such a reform fails to sustain itself over time and / or does not deliver the benefits it is supposed to –if correctly implemented-, the most frequent explanation among those who share the fundamental assumptions of the global education agenda is that the main problem was in how the "medication" was administered (assessments, accountability, etc.) and not, of course, in the "medication" itself.

In many cases, the factors that impede or hinder the introduction, adequate implementation and/or sustainability over time of technically robust solutions and their capacity to produce expected results are fundamentally political. In many others, however, and as in the case of the Mexican education reform about to collapse, it would be appropriate to ask whether it is not that in certain specific national contexts, which are very different from those contexts that gave rise to such "medication"; these "solutions" are only a façade. To begin with, perhaps "THE" problem is not what the prescribed "solution" addresses. For example, in the case of Mexico, it could be that THE educational problem in the broad sense, before that of quality education, was the social exclusion of large segments of the population at school age, which could be contributing to the spiral of insecurity and violence that plagues the country. In such a situation, the "solution" would not be, at least not in the first place, any prescription related to quality. It would rather involve measures that emphasize the expansion of coverage and increases in school retention aiming to offer children and young people the first and most elementary form of social inclusion, that is, to be a "student", which also means to have an identity recognized and positively valued within the social sphere.

Looking back to the Mexican case -How to deal analytically with a case in which many of the assumptions of the global education agenda (for example, quality education equals to more economic growth) are simply not empirically sustained? The key connector is missing, that is, the investment in quality education bringing increased employment opportunities that translate into private and social returns. In such cases, is the problem related to politics and politicians? Or is it that individuals are not willing to invest in quality education because it leads nowhere, and politicians address this issue by applying a "medicine" in the form of accountability, which is unsuitable?

The quality of education is very important. In recognizing its value, GEMRs and international learning assessments have been crucial. At a historical moment in which the school and, with it, all national education systems are located right in the vortex of enormously disruptive transformations for civilized life, however, it would be appropriate to broaden the debate to include equally central issues that have received insufficient attention at the global level. Issues such as the social relevance of the school and the school as a generator of social identity and sense of belonging have unavoidable importance. Those issues arose in a context in which quality education no longer guarantees access to good employment (see, among many others, OECD, 2015); in which schools compete - thanks to the vertiginous advances of technology and its equally vertiginous expansion - with new, more agile and interactive forms of obtaining information, knowledge and social interaction; and in which the insufficient generation of jobs is producing more and more social exclusion.

The lack of sufficient attention to these issues at the international level is being filled at the national level and not always in the best way. The imperative need that we humans have to be and live with others and to feel part of a collective is manifesting itself with unusual force as a product of long decades of hyper-individualism and forgetfulness of our fundamentally social nature. This, combined with the growing inequalities and exclusions produced by globalization and the

empire of the booming markets for so many years, has been the breeding ground for the return of community and identity to the center of politics in general and of education policy in particular.

National education systems are a key space and instrument for the production of social identities, as well as for generating a sense of belonging to a collectivity. In and around them, fundamental battles will have to be fought in the years to come. In this regard, the cases of Hungary, Poland or Turkey are emblematic. It would be very costly for all of us if these issues were not discussed globally and if international actors did not participate in these debates and battles. Hopefully, the education sector will not be left without space for sensitive, rigorous and intelligent voices capable of counterbalancing the rise of tribal nationalism.

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The Challenges of Formulating a Public Education Policy Within the Framework of the 2030 Agenda: Act in the Concrete, Impact on the Global

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Progress in any country worldwide depends on the policies that are held within them, so the relevance of policy issues is based on relations between society and individuals and on the importance given to education. At the end of the day, the function of the state is to construct a new welfare policy that stabilises and ensures social conditions of existence for the citizenry (Olssen, 2004, p. 250).

Summary

This article argues that the 2030 Agenda for Sustainable Development, which today is considered as a great framework and international benchmark for the design of public policies, implies important implementation challenges at the regional and local levels. In the education field, this involves significant participation of the whole education community, who everyday faces social and cultural challenges that are poorly acknowledged and valued in the discussion at the international level. Responding to goals through the construction of public policies calls for recognizing and looking at local needs to then achieve global goals and targets.

Keywords

2030 Agenda
SDGs
Education
Public policies
International cooperation
Action levels
Local implementation

The United Nations' (UN) 2030 Agenda for Sustainable Development, today considered as a great framework and an international benchmark for the design of public policies, implies important implementation challenges at regional and local levels. In the education field, this involves significant participation of all the actors of the educational communities, who everyday face social and cultural challenges that are poorly acknowledged and valued in the discussion at the international level. Responding to goals through the construction of public policies calls for recognizing and looking at local needs to then achieve global goals and targets.

The signatory countries of the international agreements on education must take action to respond to the various demands and to address the problems from the perspective of an international framework. The case of the 2030 Agenda and its 17 Sustainable Development Goals (SDGs) reveals a different way of addressing the current issues in a transversal manner. The implementation of the Agenda calls for countries to reinterpret the actions of their institutions and to promote reforms that consider the complexity of each issue.

Tackling complex problems implies, among many examples, to accentuate the articulation between economic growth and the participation of indigenous communities in policy design, in such a way that inequality reduction becomes explicit; through labor law reforms, decreasing the gender gap in labor force participation that impacts the Gross Domestic Product (GDP); and also increasing the incentives for all girls and boys to attend school. Undoubtedly, the conception of the SDGs represents a challenge for countries, since it makes it urgent to promote sectoral approaches that are sufficiently interdependent and cross-cutting in order to face the challenges in achieving the 17 objectives.

The Agenda for Sustainable Development insists on envisioning a comprehensive approach of interdisciplinary public policies. The challenge is not minor and it is even more demanding in the case of developing countries that have a longer way to go towards achieving the goals that have been set. Most Latin American countries, such as Mexico, already manage complex political and social processes that pose a significant burden in terms of governance and governability, making complying with global agendas even more complex.

For decades, it has been questioned how international agreements can be harmonized and addressed while still making local needs and demands visible. It has also been questioned how relevant indicators can be constructed to reflect the situation of each country and region.

Collaborate at All Levels

Interrelation and effective collaboration at different levels of action allow for the establishment of support mechanisms. International cooperation, beyond discourse, needs to move to reality and this implies governments making budget targets visible as well as building administrative, planning and evaluation processes in accordance with these goals.

The scaffolding that will make the 2030 Agenda a reality must involve building a series of support and monitoring networks that intersect with each other and that transcend international meetings to create effective public policies.

An interesting analysis framework is offered by the report of the Secretary-General of the United Nations on the Post-2015 Development Agenda, which defines four levels of international agreements' follow-up and implications for cooperation: global; thematic; regional and national (UNESCO, 2017). It delimits four levels of action:

- **Global level:** International organisations serve as a space for dialogue and feedback which countries can approach to obtain technical advice and, in a few cases, financial impulse. They are intermediaries in discussions and promote the communication of public messages.

- **Thematic level:** This level requires the inclusion of different voices, such as those of research institutes, specialists, ministries, civil society and the private sector. It results in a valuable dynamic to foster dialogue among actors who share common themes and concerns and to generate debates on the possible approaches and solutions to specific problems which will also contribute to the global dialogue.

- **Regional level:** The countries of a region share common values, objectives and challenges. They exchange information and participate in spaces that allow them to know their related issues. If they remain constant, these monitoring spaces allow us to see the performance and progress of all. Some successful experiences in this regard include the Organisation of Ibero-American States (OEI) and the European Union (EU) which have established dialogue mechanisms around the education indicators as established in the SDGs.

- **National level:** For countries, the implementation of global goals implies prioritising within their budgets and generating administrative, planning and evaluation processes in accordance with these goals. In addition to that, the introduction of a transversal perspective requires collaboration among the different levels of a government.

Besides these four levels, it is urgent and necessary to add a fifth level - the **local** one, referring to the geographical and political spaces such as the states and municipalities who have the enormous task of transferring international agreements into meaningful actions. It is essential that the spaces where local goals are to be achieved are managed by the national level through monitoring strategies.

Monitoring any global roadmap requires looking at least to the five levels of concretion described above. We must not forget that countries are the sum of decisions between different levels of government, as well as of the interrelations between nations. The public policies that have been designed and that still need to be designed for the 2030 Agenda must respond to local needs and be flexible enough to be adapted and modified to impact the measurement of the global goals.

The Construction of the 2030 Agenda in Mexico

In Mexico, the development of the 2030 Agenda has fostered a reflection on the urgent need to promote sustainability-oriented inter-institutional public policies. At international level forums, Mexico participated actively in the mobilization of resources and promoted consensus on issues such as the adoption of a multidimensional approach to poverty, the recognition of migrants' rights, biodiversity conservation, among others (Oficina de la Presidencia de la República, 2018b).

Although the elapsed time since the implementation of the agenda has been very short, it has already led to a reflection on national public policy, establishing dialogues with the different sectors of the population to define the country model we want. Since 2017, the Office of the Presidency of the Republic has been involved in commissions and working groups that have sought to include all the voices identified by the *National Strategy for the Start-up of the 2030 Agenda (Estrategia Nacional para la Puesta en Marcha de la Agenda 2030)*, which reports on the progress accomplished.
In the field of education, one of the greatest challenges has

been to design national indicators for Goal 4, which aims to: “Ensure inclusive and equitable quality education and promote lifelong learning opportunities for all”. From this great objective, 7 important targets emerge. Among them, ensure by 2030 that all girls and boys finish compulsory education, which, in the case of Mexico, would refer to completing at least basic education. Additionally, for the benefit of the national education system, it places the accent on equity.

The challenge of converting each of these targets into indicators that show progress during the next twelve years is not minor. However, the exercise of designing indicators at the state and/or municipal level has been scarce and sometimes nonexistent.

It is urgent to establish more direct and close communication with education actors. The 2030 Agenda sets the challenge of meeting the goals at the local level and requires important participation of learning centers, students and teachers as the ones who everyday face social and cultural challenges that are rarely seen at the international level.

Additionally, there is a pressing need to generate timely information that allows progress to be better tracked in the education goal targets; for example, making available the inequality figures that impact the lack or weak access to education. In this sense, addressing the targets at the global and national levels necessarily requires involving a local perspective.

It is not the responsibility of isolated actors to make visible and meet the needs of the more than 4 million children and young people between 3 and 17 years of age who are out of school in Mexico. The national and international monitoring mechanisms that help to track progress and determine the structures through which these developments take place should be conceived as a bridge connecting the different actors involved in the micro and mesostructure.

Conclusions

The 2030 Agenda gave place to a new framework for monitoring education, representing a change in the way public problems are conceived and finding cross-cutting solutions to complex problems. A new framework for action requires the participation of diverse actors, the commitment of those who make decisions and greater mobilization of resources that allow promoting equity and quality in educational processes.

The efforts towards a greater mobilization of resources, in the case of the fourth global goal regarding education, requires a push for continuous and sustainable measurement and monitoring that has an impact on the lives of millions of children and young people. For this reason, the 2030 Agenda must be assumed as a shared responsibility among the multiple actors of society.

The 2030 Agenda framework requires building links between public policies and education actors at the various levels of government. The entities in Mexico are jointly responsible for the action and educational change, and moving forward in SDG 4 necessarily requires looking at decisions and motivation at the local level. In short, the global education agenda is built locally. The possibility of converting it into an accountability instrument in regard to the state of education in our countries and to convert targets and indicators into flexible and dynamic planning instruments is in our hands.

A road map, indicators and targets help; but every effort is still insufficient if one thinks that a global or national action framework is enough. We need to demand from each country, each state, each municipality, each director, each teacher that they look at their level of co-responsibility in education. If everyone decided to formulate long-term educational policies with a strong statesmanship vision but to monitor and implement policies in the short and medium terms, the targets and indicators of the 2030 Agenda would be conceived as true starting points.

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Measurement and Comparison Among Countries in the Context of Regional Initiatives:

Do these Practices Add Value with Respect to "Global" Measurements Made by International Organizations? The Case of the Technical Cooperation Project "Learning in 21st Century Schools"

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Summary

This article analyses the case of a technical cooperation project in infrastructure between 12 Latin American countries. It illustrates how measurement and comparison initiatives applied to limited and relatively uniform geographical areas and designed according to their specific needs, can lead to findings and recommendations for immediate implementation, in comparison to global collaborations and efforts.

Keywords

Educational infrastructure
Learning environments
Schools of the 21st century
Regional public goods
Regional cooperation
Comparative studies

In 2010, twelve countries in the Latin American and the Caribbean region requested funds from the Inter-American Development Bank's (IADB) Regional Public Goods Initiative to support an intergovernmental collaboration seeking to improve education infrastructure in the region through the definition and institutionalization of minimum standards for construction and maintenance processes. The main goal of the initiative was to encourage dialogue between those accountable for these processes in each country, as well as to carry out joint studies, research and training activities, taking advantage of benefits of scale, as well as of knowledge accumulation and experience.

Eight years later, the technical cooperation project "Learning in 21st Century Schools"[1] has a significant track record. The achievements include 13 regional meetings between those responsible for the management of education infrastructure in different countries of the region[2], comparative studies on construction standards, legislation and management processes applied in participating countries, and studies that monitor the use of spaces and comfort conditions in different types of buildings and environments. The three evaluations of the project that have been carried out to date (the last one still in progress) have shown significant advances in the participating countries, which have progressively modified their regulations and practices[3].

The project has also been assessed as highly positive and relevant by its implementers, who have spontaneously organized themselves in an informal network of mutual support.

In a context in which the cooperation funds are about to end -and the continuity of the activities is not guaranteed - it is appropriate to raise the question - to what extent the results achieved through this workgroup could have also been

achieved (or continue to be achieved) through the integration of collaborative efforts on the global level, led by international organizations? An example in the field of education infrastructure is the OECD's Effective Learning Environments (ELE) programme. These global efforts are normally supported by significant and stable financial and research resources. In addition, their nature frequently allows them to access data, information and experience at the global level.

However, despite the fact that the knowledge generated by international organizations provides important resources for regional groups[4], the activities and results observed on the technical cooperation project "Learning in 21st Century Schools " suggest that geographically- and practice-focused efforts can have an added value to participants that goes beyond what global efforts can achieve.

One of the aspects that has been most valued by the "Learning in 21st Century Schools" participants (based on interviews and discussions in a focus group) has been the possibility of comparing oneself with similar realities, which adds relevance. Despite some evident differences, participants perceive the primary challenges, available resources and socioeconomic environment within the Latin American region as relatively homogeneous. The consequence of this homogeneity is that analyses and tools can be designed under criteria that are relevant for all participants. Likewise, goals and solutions applied in some countries are perceived as also relevant in others. In contrast, the discussion of developed countries' best practices tends to be considered as an inspiring exercise, but one that leads to conclusions that are not feasible and pertinent in the Latin American context. Those best practices are not easily adaptable to the region's environmental and socioeconomic context and frequently demand resources that are not available. Furthermore, beyond the possibility of being able to carry out regional studies and analysis, the consolidation of a highly homogenous group from a professional[5] and personal point of view has favored the creation of a support network whose scope goes beyond formal meetings and exchanges. Indeed, the participants of "Learning in 21st Schools" maintain a constant informal flow of communication (thanks, among other things, to the creation of a WhatsApp group). Hence, the comparison and dissemination of best practices do not only take place as part of structured exercises but also in response to concrete requests for support to respond to contextual and immediate needs. Examples of these requests could be the need for immediate response to a natural disaster or a political will to codify requirements for new spaces, i.e. a multipurpose room. It has been observed that communication is much more fluid among Spanish-speaking participants, while Anglophones (from Caribbean countries) tend to interact much less. The fact that most participants dominate only one language, not only impedes the communication between Latinos and Caribbeans but also represents an obstacle for Spanish speakers to interact in global forums in which English tends to be the predominant language.

In conclusion, this article aims to highlight how collaboration and evaluation initiatives at the regional level (in the field of education infrastructure but not only) can bring significant additional value, of a more practical nature and of immediate application, to global level comparisons. This needs to be considered on the backdrop of the fact that the existence of a good level of homogeneity among the needs of the participants allows to better adapt research and exchanges towards participant's interests and context. Likewise, the alignment of needs can favor the creation of professional communities oriented towards collaboration and mutual support.

The literature suggests that cooperation at the regional level reaches its maximum benefits in cases in which the sum of efforts between countries allows significant economies of scale and positive externalities while maintaining a low level of heterogeneity in preferences and information asymmetries (Estevadeordal & Goodman, 2017). In this context, it is expected that the usefulness of these efforts will be maximized when the participating countries are defined based on the similarity of context, socio-economic situation (i.e., issues and challenges faced), geographical proximity or membership in political alliances.

The specific case examined in this article highlights the determining role (inclusive or exclusive, depending on the condition of each participant) that the use of a predominant local language (Spanish) had in the effectiveness of information exchange. This triggers reflection on the relevance that the use of local languages for these types of exercises and interactions still has; and the consequent *de facto* limited use of participation in global forums by not only many developing countries' national institutions but also developed ones.

Endnotes

1. The "Learning in 21st Century Schools" initiative is a technical cooperation project between Latin American and Caribbean countries that was developed in two phases (2011-2014 and 2014-2018). The initiative aimed at improving the conditions of school infrastructure in the region through the definition of minimum standards for it, as well as through reviewing the processes used in construction and maintenance. Both phases have been supported financially and at the coordination level by the IADB. For more information, consult the website: http://bit.ly/IADB_IE_EN (English version).
2. With two exceptions, the 12 countries that launched the cooperation project have continued to participate formally in it, and two additional countries were added afterwards. Other countries (e.g. Ecuador and Haiti) have also occasionally participated in the cooperation activities; in fact, these activities are open to all those accountable for educational infrastructure management processes in the region, although those countries that are not formally part of the cooperation project have to pay for the participation of their representatives with their own funds.
3. In the period between 2013 and 2016, in particular, important changes have been observed in terms of regulations, standards and practices of school construction and maintenance (for more details, Note 11 of the "Study on the advances in regulations and school infrastructure standards", available here: http://bit.ly/AvInfrEsc). In the absence of an impact assessment, no definitive conclusions can be made on the extent to which these changes were the direct result of the technical cooperation. However, interviews made with the technical liaisons indicate that it did have an important influence on them.
4. Since 2017, the ELE programme and the technical cooperation project "Learning in 21st Century Schools" have maintained a constant and open dialogue. In particular, they have been collaborating in the adaptation of OECD instruments for the evaluation of the use of educational spaces and their influence on learning in the context of the Latin American region.
5. As already mentioned, the people in charge of managing the education infrastructure in each country are those who participate in the regional workshops, who tend to also play the role of the decision makers in regards to in all cooperation activities. Usually, they have an architect or civil engineer profile. The name of the specific position of each participant and their exact position in the hierarchy of the respective government may vary depending on the country of origin.

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What is the Place of TERCE Data in International Agendas? A Comparison of the Content of Regional Information on School Infrastructure and its Use in Global Reports on Education

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Summary

This article analyses the use of TERCE information in UNESCO's 2016 Global Education Monitoring Report and the relevance of the information on school infrastructure reported by TERCE for meeting the objectives of the 2030 Agenda for Sustainable Development, specifically in relation to Goal 4, quality education, and target 4.a, improvement of school infrastructure. The analysis focuses on the case of Latin America and offers TERCE as an example of successful South-South collaboration on data collection and analysis. It is proposed that the production of regional data would facilitate making more pertinent and contextualised recommendations.

Keywords

GEM Report
Regional standardised tests
TERCE
Infrastructure.

This paper seeks to analyse how information from a standardised regional test, the Third Regional Comparative and Explanatory Study of the Quality of Education in Latin America (TERCE) conducted by the Latin American Laboratory for Quality Assessment of Education (LLECE), is used in the 2016 Global Education Monitoring Report (GEMR) (UNESCO, 2016). This report lays the foundations for a multidimensional understanding of sustainable education in pursuit of the goals of the 2030 Agenda for Sustainable Development. The use of TERCE data is discussed as a way to observe how South-South evidence is collected using regional data, which elements are included in this discussion, and, when compared to the information on school infrastructure included in a TERCE-based report, which elements are left out.

At the international level, infrastructure is one of the areas to which most resources have been allocated, towards reaching, first the UNESCO's 2015 Millennium Development Goals and, currently, the 2030 Agenda for Sustainable Development. However, it is also a category that has not been much discussed internationally. This plays out, for example, if we consider the indicators used in the GEM Report to calculate school coverage. The access to schooling indicators does not include the existence and quality of school infrastructure, both of which are fundamental enabling elements for appropriate access to education. The lack of an indicator that evaluates these points is especially noteworthy given the economic efforts developing countries have made to improve school and general educational infrastructure.

Global Agendas and Standardised Tests: The Place of TERCE in the 2016 GEM Report

The debate about how global education reports, such as the 2016 GEM Report discussed here, influence the national and regional educational agendas is open and contested. The existence and quality of school infrastructure, for example, can vary widely. In the context of the 2030 Agenda for Sustainable Development, Target 4.a, involves the construction and updating of educational infrastructure, making it a fundamental condition for accomplishing Goal 4—quality education for all. Because they provide standardised and comparable measures related to the quality of education, international assessments of educational achievement are highly attractive instruments for measuring educational quality in global reports. Regional standardised tests such as those carried out by LLECE can be seen as mechanisms not only for counteracting the weight of global tests such as the Progamme for International Student Assessment (PISA) in the international discussion on quality education but also for generating monitoring and tracking instruments adequate for particular sociocultural realities, such as those found in Latin America. The relevance of school infrastructure to supporting and facilitating teaching-learning processes and, consequently, to improving educational quality (Barrett et al., 2013), highlights its importance and the need for an assessment such as TERCE that includes school infrastructure data.

The impact of school infrastructure can be seen in Figure 1, which presents the proportion of students with low achievement (close to 1 or 100% on the horizontal axis) in terms of the level of school infrastructure, as defined by the LLECE index. Especially in the case of mathematics, the relationship between low achievement and attending a school with poor infrastructure is particularly high.

This point is the key focus of our analysis. Our objective is not to minimise the importance of good teacher training or good school programmes. However, the high sums involved in infrastructure investments and the new challenges with respect to resilient infrastructure associated with global warming (UNESCO, 2016, p. 64), lead us to focus our analysis on the relevant data provided by TERCE and to suggest that the use of similar regional information sources, such as TERCE, could help other countries in the Global South to monitor and evaluate their school infrastructure. This matter is of great importance because the high costs associated with school infrastructure are linked to both the economic situation and the education system of a country.

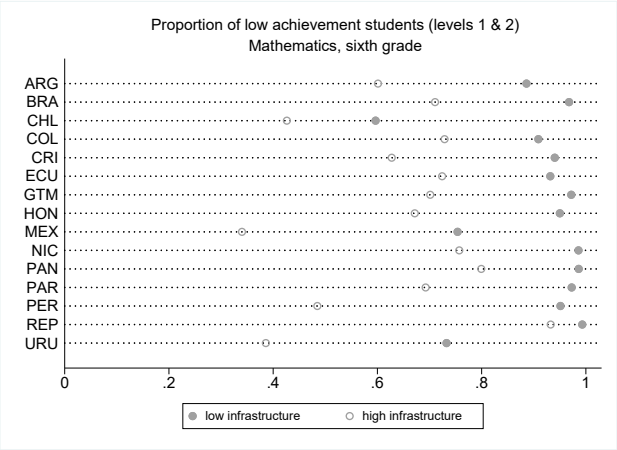

Figure 1. Proportion of underperforming 6th Grade students in mathematics (TERCE levels 1 and 2) in relation to school infrastructure (authors' analysis based on TERCE data).

The 2016 GEM Report (UNESCO, 2016) uses the tests carried out by the LLECE as an example of policy coordination among the participating countries to define not only the content of the various instruments used by the evaluation system but also quality education in Latin America. However, despite the fact that the Sustainable Development Goals (SDGs) acknowledge the importance of infrastructure and that Chapter 17 of the 2016 GEM Report discusses the relation of school infrastructure information and communication technologies with educational quality (UNESCO, 2016, p. 17), the infrastructure-related data from TERCE is ignored. The data provided in the GEM Report do not provide a clear sense of the adequacy of school infrastructure. Given this gap, data from TERCE and its predecessor, the Second Regional Comparative Explanatory Study (SERCE) could help to identify simple and objective variables related to basic infrastructure and to more advanced facilities, such as a director's office, meeting room for teachers, multipurpose space, gymnasium, and science laboratory, which may have direct impact on educational processes (OREALC/UNESCO & BID, 2017).

The Inter-American Development Bank (IDB) has issued reports related to the sufficiency, equity and effectiveness of school infrastructure in Latin America for both TERCE (OREALC/UNESCO & BID, 2017) and SERCE (Duarte, Gargiulo, & Moreno, 2011). These reports make it possible to assess all of the infrastructure characteristics mentioned above and, in addition, the presence of adequate equipment inside the classrooms, including desks and chairs for the teacher and students, a board, markers or chalk. According to the TERCE-based projection included in the IDB report (2017), it was estimated that only Chile would achieve proficiency in the infrastructure areas evaluated for most of its schools (73%). In contrast, schools in the Caribbean countries would have high levels of insufficiency in all the items, even when controlling for per capita income. Countries with similar per capita incomes, such as Panama and Uruguay, would be likely to

have very different levels of infrastructure adequacy in terms of access to water and sanitation (44% vs. 66%), connection to services (64% vs. 98%), and academic spaces (37% vs. 73%). These findings would imply that, regardless of national income, public policy priorities can improve advancement in these areas. Presenting a fuller description of these policy decisions would allow the countries of the region, and those in other developing regions, to learn from effective (and ineffective) decisions regarding infrastructure.

Gaps in TERCE and Opportunities to Learn from National Experiences in Latin America

The great effort involved in the production of the 2016 GEM Report and the opportunity it presents to share experiences among developing countries and across language barriers suggests that it would be possible to draw together evidence from Latin America in a more effective fashion. It could be done either by requiring more detailed background information on each country or by increasing the coordinated efforts of Latin American countries to impact the international education agenda.

As a starting point, the Chilean case provides a useful model. Chile has not only included infrastructure in its policies to address the challenge of improving mandatory education but also maintained reliable documentation on aspects such as financing, school design—(including baseline requirements for the number of square meters per student per educational level)—and climate-specific considerations for ensuring infrastructure is sustainable (MINEDUC, 2000). This inclusion of climatic factors in the sustainability criteria used as part of planning for infrastructure expansion makes the Chilean case of particular international interest.

The infrastructure expansion in Chile occurred within the framework of the extension of the school day. It was the result of the work of the national Ministry of Education in conjunction with UNICEF, an alliance similar to that which other developing countries have established to work towards education goals. Colombia is currently involved in a similar process and has also generated guidelines for minimum standards of comfort for students within educational spaces in terms of visual, thermal, and acoustic factors, (Paulsen, 2009) and for the expansion and maintenance of school facilities (MINEDUCACION, 2015). Other recent regional studies of potential international relevance have presented evidence of the impact of investment in school infrastructure in Peru (Campana, Velasco, Aguirre, & Guerrero, 2014), Colombia (Iregui, Melo, & Ramos, 2006), and Chile (Riveros, Concha, Luco Rojas & Saavedra Caviedes, 2015).

infrastructure and the challenges of financing, designing, and maintaining school facilities and to facilitate inclusion of regional information in global reports, it would be helpful to establish an analytical and evaluator framework that would make it possible to summarize infrastructure-related challenges and policy approaches in the region. The IDB, which has financed much of the expansion of school infrastructure in the region, has prepared a number of reports on infrastructure which could be used to complement the analysis of the impact of school infrastructure on learning in the countries that participate in the SERCE and TERCE evaluations.

A final key element, and one that is missing from the education infrastructure-related data provided by the LLECE studies, is information related to access for students with a physical disability. Simple questions on factors such as the minimum accessibility criteria for Latin American schools or the presence of restrooms accessible to students with physical disabilities would provide indicators to improve one of the region's great challenges: equity of opportunities to access education. In addition to what the team developing the next GEM Report is able to generate, these elements could be included in a forthcoming report thus improving the participation of the region in the construction of global education reports.

Endnotes

1. LLECE is a subsidiary of UNESCO and receives input from the countries participating in the evaluation. It has established itself as a forum for learning and transfer of technical skills among the countries participating in the LLECE evaluations. As a regional entity for technical cooperation on education, it offers a framework for defining standards and for learning from the experiences of neighboring countries with comparable sociocultural contexts.
2. Although UNESCO's GEM Report, has not been highly criticized, the debate between Klees (2017) and Benavot (2017) regarding the impossibility of achieving the goals of sustainable development, especially SDG4 on access to quality education, is noteworthy. Likewise, Klees (2017) has criticized the World Bank's recent report on learning (World Bank, 2018) for its limited perspective on learning, for not considering access as a basic enabler of the opportunity to learn, and for sustaining a vision that blames teachers for shortcomings in the learning achievements of the world's children.
3. In this paper we will refer to what is known as "international educational surveys" (Hannum, Liu & Alvarado-Urbina, 2016) as either international standardised tests or as international surveys on education.
4. The way in which PISA affects the global agendas on what constitutes quality secondary education, the cultural aspects it does not consider (Meyer & Benavot, 2013), the possible powers and intentions involved (Kamens & McNeely, 2009), and the associated measurement problems (Wagemaker, 2008) have been highly contested and are still a matter for debate.
5. The school infrastructure index constructed by LLECE is a simple index based on the presence of physical spaces— including an office for the school director, additional offices, a meeting room for teachers, a gymnasium, a computer room, an auditorium, an arts or music room, an infirmary, one or more science labs, and a school library: basic classroom equipment such as chairs and tables for teachers; and basic services including, drainage or sewerage, fax, bathrooms in good working condition, internet connection, garbage collection, and student transportation (UNESCO & LLECE, 2015a, p. 170).
6. These reports can be consulted through the following site: https://www.iabd.org/es/educación/aprendizaje-en-las-escuuelas-del-siglo-xxi/digital-library.

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Global Reports on Education and International Organisations: Cartography for the 21st Century

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Summary

This article discusses the growing role of international organisations in educational policy worldwide. First, from the perspective of global governance, it criticizes the way in which these international agencies influence decisions within countries and the extent to which citizens affected by these decisions have no direct voice on the work of agencies such as the World Bank, the OECD, or UNESCO. Second, it analyses the type of information generated by these organisations, the advantages and limitations of their reports, data, and the specific case of assessments such as PISA. Finally, it discusses the case of international rankings of universities as an example of gaps in the information presented by international organisations.

Keywords

International Organisations
Education
Politics
Global Governance

The main international organisations in charge of educational issues—the World Bank (WB), the Organization for Economic Cooperation and Development (OECD), and the United Nations Educational, Scientific and Cultural Organization (UNESCO)—produce a series of national, regional, and global reports, surveys, and standardized tests that set the agenda on the educational issues deemed relevant for world education policy. At the same time, a recent wave of conservative, chauvinist and anti-migratory movements has led to questioning of international organisations and other global players. The information that these organisations produce, therefore, is not exempt from doubts about its use and influence, and this seems to be a good moment to reflect not only on the role and usefulness of their work in education, but also on the geopolitical issues they promote.

Among the organisations mentioned above, the WB is the only body that produces official policy documents to guide its work, the so-called "World Bank Educational Strategies", of which at least four editions have been published so far (1995, 1999, 2005, and 2011). The WB is widely recognized as one of the most influential agencies in relation to regional banks in Asia, Africa and the Americas. Also, considering the large number of reports that it issues annually, (Bassett & Maldonado, 2009) it is also a knowledge bank. In fact, in 2018, for the first time, the WB decided to dedicate its annual *World Development Report* to a purely educational topic: learning. This focus is in line with its 2011 educational strategy document, which focused on the theme *learning for all* (World Bank Group, 2011).

In several ways, this focus is linked to the stance held by the OECD. The OECD has created several instruments to generate data on the skill level of individuals, notably the Programme for International Student Assessment (PISA); the Programme for the International Assessment of Adult Competencies (PIACC); the now defunct Assessment of Learning Outcomes in Higher Education (AHELO); and the Teaching and Learning International Survey (TALIS). The OECD (2016) considers

skills to be today's main currency of exchange. Calling skills currency is not coincidental; just as currencies depreciate or increase in value, the value of skills is variable and depends on the situation of a given field of work, technological innovations, or national contexts. Thus, the WB privileges learning and the OECD skills, and both agree on the need to look for better ways of measuring what students learn and what skills they have acquired in their time at school. The difference is that the WB, in conjunction with the regional development banks, grants financing for projects while the OECD manages its influence as a think tank.

UNESCO, in turn, is currently focused on the fulfilment of the Sustainable Development Goals (SDGs) launched in 2016. These are essentially a renewal of the Millennium Development Goals that were prepared in the context of the beginning of the 21st century. Goal 4 of the SDGs is to "ensure inclusive and equitable quality education and promote lifelong learning opportunities for all" and seeks to ensure that all girls and boys complete their free primary and secondary education by 2030. Since they were first announced, these objectives have served as guidelines to be followed by international organisations linked to the United Nations (UN), such as the United Nations Development Program (UNDP) and the United Nations Children's Fund (UNICEF), and even by the main bilateral development agencies—such as the United States Agency for International Development (USAID) or the Japanese International Cooperation Agency (JICA) (Bassett & Maldonado, 2009). As a result of the UNESCO agenda, monitoring reports have been produced on topics such as inclusion, migration, accountability, education, and development. Monitoring reports have also been based on the *Education for All* agenda, which existed prior to the Millennium and Sustainable Development Goals. Also, in 2018, UNESCO published a programme document, *15 Clues to Support the Education 2030 Agenda* (Opertti, 2017), in which it concisely and clearly listed the education issues that countries should focus on.

In the discussion of global governance as a tool for better understanding the type of influence that international organisations have on their member countries, it has been said that while we can speak of the existence of global governance (decisions that governments eventually make that affect all), there is no global government (collective decision making and listening to those affected by policies) (Karns & Mingst, 2004). Neither it is possible to talk about a system in which global justice is possible (Sen, 2009). Moreover, as Barnett and Finnemore (1999) suggest, international organisations often make authoritarian decisions that affect every point on the globe and impact areas as public as government spending and as private as reproductive rights. In the case of education, what is clear is that no agency establishes regulations related to education in the sense of laws that imply penalties for non-compliance or violation of agreements. Their most common activities involve issuing quasi-legal documents, or soft laws, guidelines, regulations and—of course—policy recommendations.

Furthermore, there is a certain pressure "to be part" of these education assessments. Perhaps no example is more illustrative than that of the OECD and PISA. Many countries have initiated educational reforms justified on their PISA results (Lingard, 2016). In fact, PISA is an instrument with such influence that Rutkowsky (2007) and other authors have pointed out that an increasing number of countries want to continue participating although PISA shows them to have unsatisfactory results. PISA has become an indicator to identify the relative position of countries—in terms of skills and problem solving—how much they have advanced, and how near to or far they are from nations with education systems that score better.

Thus, these global reports serve as maps that guide countries in their policies. Like any system of cartography, the type of map that should be used depends on what you are looking for. International organisations take it upon themselves to produce a series of data and reports that, as is no secret, follow their economic, social, or educational agendas. In the cases outlined above, these centre on skills, learning, evaluation, and quality of education. The route that each country decides to take, however, should be studied separately, as should the paths of negotiations between governments and international organisations.

Another issue for discussion is whether these instruments or reports— such as, for example, PISA— have helped to improve education in the countries evaluated. We should remember the letter addressed to Andreas Schleicher, director of PISA, and signed by a prominent group of scholars, who questioned OECD not having an explicit mandate to improve children's education (The Guardian, 2014). They pointed out that the assessment has in fact had a contrary effect: creating anxiety, strengthening the culture of standardized tests, and resulting in attention to certain disciplines at the expense of neglecting other areas such as the physical, artistic, or civic development. The other issue discussed in the letter is that the criteria for carrying out an education reform in any country cannot be based on a single report or on the results of a single standardized test. The application of unitary recipes for all countries should have already ended some time ago, even more in the case of developing countries. I believe that these criticisms provide a good synthesis of the questions that should be posed about the work of these organisations, but more analysis and evidence related to the effects of their work is needed. Research on international organisations and their impact on educational policies still has a long way to go.

The other subject to consider is what happens when governments have no voice and other actors fill in the gaps in the information required for policy design and implementation. A good example of this phenomenon can be seen in the international rankings of universities, which constitute another kind of map. These rankings position the most important universities in the world in relation to the place they occupy in terms of the development of a certain type of knowledge (publications) or indicators such as the number of international students they attract or the Nobel prizes they earn annually. The current rankings of universities worldwide are prepared largely by private companies. Although one of them was initially conceived within a university in China, it has now developed as an independent company. These rankings have affected public policies on higher education, the deliberations of many governments about the future of higher education institutions in their countries, and the courses set by university officials themselves (Hazelkorn, 2017). What is clear is that these rankings have come to cover a need, and, although criticized, they have been widely used among specialists and decision makers.

The final point is that although international organisations impact government decisions or make budget allocations that impact countries and peoples' lives, national governments retain primary responsibility for the decisions and actions they do, or do not, take. At times, their margin of negotiation is tight, but at others from the outset they renounce the possibility of negotiating and making alliances with other similar countries to strengthen their positions. In this sense, reports and data are like maps that impose worldviews. The issue is which map you use and what you use it for. A strong criticism of cartography is that for a time it was dominated by Eurocentric maps that privileged a certain vision of the world and thus failed to describe the size of other regions of the world with rigor. However, over time, other proposals appeared, such as the Peters Projection map that took the location of the equator as a baseline reference for rendering the world in more realistic proportions. To continue the analogy, the people who prepare global reports on education produce data and results that impose a particular view of education. However, it is up to the people looking for answers to decide which map is best suited to their purposes and to determine what other options could be used or even created. In addition, comparison is a human exercise and a resource that is also used in science. Undertaking comparative exercises related to educational outcomes can always be useful. Sticking to a single type of data or references is not a good idea: in these times, having various suitable tools that make these comparisons seems indispensable.

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Agency in Higher Education for Social Change: How Do We Learn from Our Actions?

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Summary

This article affirms that there is a little explored area in the Global Monitoring Reports (GMRs), and it is that of international education exchanges. Even if public and private support for international higher education have increased opportunities for students to participate in university education, and GMRs have increased their focus on this area of inquiry, there is less being done to assess the results and to learn from findings to inform policy and practice. Evidence around how higher education opportunities contribute to personal and professional growth, how they contribute to the global workforce, but also how they are influenced by local context, are critical to understanding educational development around the world.

Keywords

Higher education
Student mobility
International scholarships
Evaluation
Impact

The promulgation of global monitoring reports (GMRs) in international education has brought to the global education agenda themes and topics that deepen our understanding of the purpose of education: for whom and by whom, for what ultimate purpose. These reports and agendas help shape global perspectives and understanding of education topics. At the same time, the GMRs' larger roles as influencers are much more limited. Where does this leave us?

In my assessment of the international education landscape, and higher education and international scholarships in particular, we have made progress but there is still much work to be done. Higher education's representation in GMRs has been very limited. The Millennium Development Goals, for example, focused solely on primary education, leaving those of us working on secondary or higher education in tenterhooks (Assié-Lumumba, 2015; IIE, 2013). After all, the pathways to promote sustained education ultimately respond to the need that individuals have to develop professional, vocational and technical skills to succeed in the global marketplace.

Since that time, the Sustainable Development Goals and Goal 4 now have a sustained focus on higher education (Target 4.3) and international scholarships (Target 4.b). My focus on international higher education, particularly in the Global South, comes from an interest in the growing mobility of students around the world. In Latin America, the center of attention on international higher education is quite important (Balán, 2013).

Support for international higher education has increased opportunities for students to participate in university education and to promote higher education pathways for marginalized populations. This is where Target 4.b and the focus on international scholarships become quite important, in that it offers scholarships as a way to increase access and equity in higher education (Bhandari & Yaya, 2017; UNESCO, 2018). Indeed, key international scholarship programs supported by government, but also private foundations,

have shown the role that international higher education scholarships can play in this space (Perna, 2014).

Research has increased to identify the types of international scholarships that are being administered (Mawer, 2014). The landscape is vast. While there are traditional international scholarship programs such as the Rhodes Scholarships or the William J. Fulbright Scholarship, there has been a great increase in their number, funded by private foundations (important to note that in its current definition, scholarships funded by private foundations are not counted in Target 4.b). Scholarships often have an intended focus to provide educational or technical training to their participants, often with additive complementary training in a specific discipline or for an intended audience. Many scholarship programs focus on leadership and the promotion of social leaders or change agents who will be able to capitalize on the scholarship opportunity to galvanize change (Martel, 2018).

In spite of that, there is much less being done to assess the results, how interventions are shaping education policy at the government or non-government level (Mawer, 2014; Martel, 2018) and how these effects support or impede future international educational development. For many years, international higher education scholarships were seen as a good in themselves, promoting education access to those who would not be able to attain it otherwise. That is potentially even the reasoning behind Target 4.b, and the expanded definition provided by UNESCO that stresses the focus of these scholarships on providing opportunities to those who would not otherwise have them.

But, have the results of GMRs, specifically in international higher education, led to agency and learning? Have they shaped education policy? I think the findings here are much more limited, due to four factors:

- First, the outcomes and impacts of scholarships are varied and relate back to the goals of higher education. Unlike basic levels, where we can see a clear outcome in cognitive skills or finished schooling, the outcomes of higher education are more contextual. As Campbell and Mawer (2018) discuss, these outcomes can range from the economic impacts to the individual capabilities of students to promote social change. Measurement of international scholarship outcomes also introduces the complexity of leadership, and the effect that many recipients are chosen based on their leadership potential. Attribution issues are then much harder, and as such many scholarship programs have focused more on contribution theory and linking opportunity to impact (Martel & Bhandari, 2016; The Mastercard Foundation, 2016).

- Second, context plays a critical role. In higher education particularly in the Global South, the local economic, social and political context of a country has a significant effect on individuals being able to succeed in the global workforce and marketplace (Brown Murga & Martel, 2017). If a graduate cannot obtain a job because the current economic context of their country is decisively poor, or they decide to leave their country due to the local socio-political conditions, or violence, is this considered a failure? It is difficult to discuss definitive indicators of success when often the very outcomes of higher education and scholarships are adversely affected by local conditions.

- I want also to share that in the context of the Global South, another important consideration is the perception of international scholarships as a venue to coercion and further normalization of Western global education norms. In international educational development, neoliberal tendencies come to mind and the reality that most international scholarship programs are funded by governments and organizations from the Global North (Brown Murga & Martel, 2017). While more scholarship opportunities may be arising from the Global South, it is imperative to consider that programs that focus on aiding those from the Global South, often are denounced for exploiting the same factors. Here is another important lesson learned for international scholarships: Understanding the local context and the way that scholarships may be perceived and understood, realizing that international scholarship recipients are agents themselves and have agency in their scholarship experience.

- Finally, there is the understanding that in order to move education forward, we need to learn from our practices and inform education policy and practice moving forward. And here is where research on international higher education can continue to strengthen. We should be learning from our approaches, understanding how interventions are benefitting individuals and their communities, and strengthening approaches worldwide. While practices in basic education have come farther in this arena, there is more to do in international higher education, and especially in scholarship programming (Dassin, Marsh & Mawer, 2018). Evidence around how higher education opportunities contribute to personal and professional growth, how they contribute to the global workforce, are critical to understanding educational development around the world, and should be put in context with discussions of effective practices and techniques. This area of international higher education research has been underrepresented and underfunded, and Global Monitoring Reports have a role to play in this sphere, strategically informing and shaping the landscape.

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Part 3

Communication and Dissemination Strategies of Global Reports' Results

The Urgent Need for Effective Explanation of Educational Evaluations in Mexico

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Summary

This article warns that the publication of global education evaluations in the media has fallen and examines the public-policy implications of this decline. Given the lack both of journalists specialized in education and of practical explanations—which should be issued by the organisations and by those who apply international evaluations and prepare the corresponding reports—on the impact of these studies on day-to-day educational practice, the press is limited to disseminating indicators and relative positions in world rankings - figures that do little to explain the real state of education in Mexico.

Keywords

Educational Evaluation
Mexico
Political transition
Media Coverage
Dissemination of indicators
International Education Rankings

What impact do educational evaluations have on public policies in the participating countries? How can international rankings be seen as roadmaps, not only for the institutional actors involved in education but also for students and parents? How can these studies be used to represent more fairly the education provided in distinct societies?

The questions above reflect the concerns of a journalist, not those of an education policy expert. These are the questions that an information coordinator or journalistic content editor in Mexico considers whenever he or she encounters national and international studies on education in Mexico. Given the paradox that this nation is currently dealing with in the field of education, the need to find answers is ever more urgent.

At a moment when the role of the state as a provider of education is constantly evolving and global reports and international assessments are most needed to make educational improvement a universal right in all nations, internal public policies in Mexico seem to be moving in the opposite direction.

During the 2018 electoral campaign, President Andrés Manuel López Obrador (AMLO) centred his speech on education on a single idea, one that garnered the support of left-of-centre political groups and a cluster of social organisations, including teachers - the cancellation of the incumbent's flagship education reform (Valadez, 2018).

From 2013 through 2018, his predecessor, Enrique Peña Nieto, promoted education reform as a central pillar of his presidential term. This policy measure focused on applying mandatory assessments to select candidate teachers wishing to join the professional teaching service and applying performance-related tests to ensure the aptitude of teachers already in service.[1]

What may have sounded like electoral demagoguery has begun to materialize. In December 2018, less than two weeks after assuming control of the federal government, the new president signed his education reform initiative, aiming at

eliminating the legislation promoted by his predecessor (Muñoz & Poy, 2018). Among other matters, the new proposal included eliminating the current National Institute for the Evaluation of Education (INEE) and replacing it with a new body to be called the National Centre for the Revaluation of Teaching and the Continuous Improvement of Education.

Given the political circumstances associated with the change of administration in the Mexican federal government, public opinion has focused on the imminent redesign of education assessment policies at the national level. Particular attention has been given to teachers' demands that evaluations should not be linked to punishments, such as the dismissal of teachers deemed unfit for classroom teaching.

Education authorities, civic organisations, parents, and the media have centred their attention on the possible changes to be implemented by the new federal administration. Because of that, they have lost sight of, or at least not given priority to, Mexico's relative ranking in global reports and international assessments.

This article does not purport to offer a detailed analysis of either the way in which the Mexican press approaches education-related studies issued by organisations such as the United Nations Educational, Scientific and Cultural Organization (UNESCO), the World Bank, and the Organisation for Economic Co-operation and Development (OECD). It also does not pretend to offer an analysis of the way in which national results of on assessments like PISA and school performance data from national evaluations such as the National Plan for the Evaluation of Learning (PLANEA) are communicated. The intent is simply to note that the national environment is not conducive to reporting global education indicators and that there is a general lack of understanding related to the impact these studies have on national public policy.

Faced with a lack of journalists specialized in the education sector and the absence of concrete explanations of the influence that these analyses should have on everyday educational practice, there is a pressing need for solid explanations and clear examples of the scope of these evaluations and the importance of using the information they provide to develop public policies or modifications to teaching and learning processes. Otherwise, as occurs very often, the dissemination of diagnoses and evaluations is limited to transmitting scores and rankings, figures that explain little or nothing about what adjustments should be made to the national education system.

What recommendations are available may also be ignored. For example, among the conclusions of the 2017/2018 World Education Monitoring Report (UNESCO, 2017) was a warning about the negative effects of transferring responsibility for the underlying problems of the educational systems to certain actors, a warning that had little echo in Mexico. At most, a few reflections were recorded in newspaper articles. David Calderón, executive president of the organization *Mexicanos Primero*, for example, recapped UNESCO's recommendations to encourage lively media discussion about the results of educational assessments and to make it easy to consult relevant indicators for the education sector (Calderon, 2018).

Similar gaps are evident in relation to consolidated evidence, such as that offered by PISA. Far from leading to authentic willingness of authorities to obtain a real and useful diagnosis to identify gaps and make changes to educational processes, the data has actually created the perverse effect of authorities' designing strategies "to prepare" students before the assessment (González, 2018), much as if the objective was simply to do well on the test.

Attitudes of this type neither contribute to understand the processes involved in education assessments nor do they generate an environment conducive to making improvements based on results. As the education researcher Eduardo Andere has pointed out: "Teaching for the test is a very bad idea. It is like giving a sick person an aspirin so that he does not reveal his ailments when he goes to the doctor. Not even with the best intentions in the world, it is good to do so" (Andere, 2018, p. 11).

In the same article, which was published after the Ministry of Public Education (SEP) announced its intention to prepare students for the 2018 application of the PISA test, the scholar explained: "The research literature is full of reasons, pedagogical and non-pedagogical, for which the idea of "preparing students" to obtain good results on standardized assessments, especially high visibility ones such as PISA, is harmful for all involved" (Andere, 2018, p. 11).

In fact, even national assessments in Mexico have not been immune from modifications and adjustments made as a result of changes to the political administration. For example, the National Evaluation of Educational Achievement in Schools (ENLACE) applied annually by SEP from 2006 to 2014 to measure learning outcomes in language, arts and mathematics in primary and secondary schools was suspended, at least on paper, to transfer responsibility for such evaluations to the National Institute for the Evaluation of Education (INEE). INEE was granted constitutional autonomy in 2013.

The same susceptibility applies to PLANEA, an annual external review designed in 2015 to determine the educational achievements of students in the final year of primary (sixth grade) and junior secondary (ninth grade). The cancellation of this evaluation in 2016 caused a public confrontation between

SEP, which argued the suspension was based on technical grounds, and the INEE, which adduced budgetary motives for continuing to use this diagnostic instrument.

In a way, these examples illustrate the current environment in Mexico and the degree of willingness to submit to assessments of educational performance; the picture does not look at all good.

To oblige authorities to implement necessary improvements in the education sector, the time has come for researchers, scholars, civil organisations and the actors within the national educational process themselves—administrators, teachers, parents, and students—to contribute ideas to engender a virtuous circle involving the establishment, broad dissemination, and widespread understanding of educational assessments.

In Mexico, it is urgent to provide an explanation of the scope of educational assessments and to see a real willingness of educational authorities to understand that such diagnostic assessments cannot be cancelled because they are the basis to have some indication of the quality of education that students receive in the nation's classrooms.

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Endnotes

1. See http://www.presidencia.gob.mx/reformaeducativa/

PISA: The Importance of Communication Strategies to Inform About Large-Scale Assessments

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Summary

This article addresses the importance of international standardised assessments, especially PISA, being accompanied by clear, simple communications that raise awareness and inform the education community about their relevance and the challenges they imply. The article draws upon the experience of the author in the PISA-centred communications campaign undertaken in Mexico in 2009 to identify the strategy, messages, recipients and allies to be taken into account as part of such an effort.

Keywords

Communications strategy
PISA
OECD
INEE

The Program for International Student Assessment (PISA) of the Organization for Economic Cooperation and Development (OECD) evaluates the academic attainment of 15-year-old students. The assessment takes place every three years and evaluates three skill areas: reading, mathematics, and science. In each application cycle, however, the emphasis given to each skill area varies.

In Mexico, the PISA test has been applied since 2000; its most recent application was in 2018. As established by the OECD, the purpose of PISA is to provide information on the knowledge and skills key to full participation in society. The information collected allows OECD members to make the necessary decisions to improve education in their countries.

The OECD randomly selects the sample of schools that will participate in the assessment. In Mexico, the National Institute for the Evaluation of Education (INEE) does the same to select the specific students who will take the test. This information is not made public until shortly before the test is applied. Although not all schools and students participate in PISA, the main objective of the 2009 communications programme was to inform as many principals, teachers, and students in the third year of lower secondary school (9th grade) about the test and its characteristics.

As a professional communicator, I consider it to be of the utmost importance that this type of large-scale assessment is accompanied by a communication strategy that raises awareness and informs the education community in a clear and simple manner. This type of information aims to foster acceptance and improve the implementation of the assessment.

During the 2009 cycle of PISA, I had the opportunity to participate in the design and implementation of the communications strategy for the application of the test. In that year, the assessment was applied in 1,535 schools spread throughout the country, and, in total, 38,250 students were assessed. The participation rate the OECD required for students was 80% and for schools, 85%; the actual participation rates achieved were 95% and 98%, respectively (Díaz, Vazquez, Canales, Solís, del a Cruz & Morelos, 2010).

It is worth mentioning that the PISA 2009 National Strategy involved different approaches. The first was a training strategy that included, among other aspects, a national meeting aimed at informing key educational actors about the test and the preparation of manuals for both teachers and students. These manuals included information about what was involved in taking the test and a series of sample exercises to help both teachers and students to understand what they could expect from the test itself. Another component of this strategy was the installation of a telephone helpline, PISATEL, with the purpose of providing advisory services to interested parties and answering questions about the assessment. Yet another aspect of the overall strategy was a communications programme, which will be discussed in more detail below.

To raise awareness of PISA among the education community, the communications team prepared a series of messages that were short, simple, easy to understand, and easy to remember. These messages posed key questions for developing a general sense of what the programme is all about, including, for example, the following: What is PISA?, What does it evaluate?, Why in Mexico?, Who participates?, and When and where is it applied?

Another aspect to be considered in preparing a strategy related to assessment is that when being assessed many students feel anxious or stressed due to the possible consequences of failing the test. This phenomenon was illustrated in the results of questionnaires applied as part of PISA 2015, which measured, among other factors, the psychological well-being of students and their anxiety related to schoolwork. According to these results, 50% of Mexican students become tense when they study for an exam, 79% worry about obtaining low grades, and 72% often worry about the difficulty of exams.

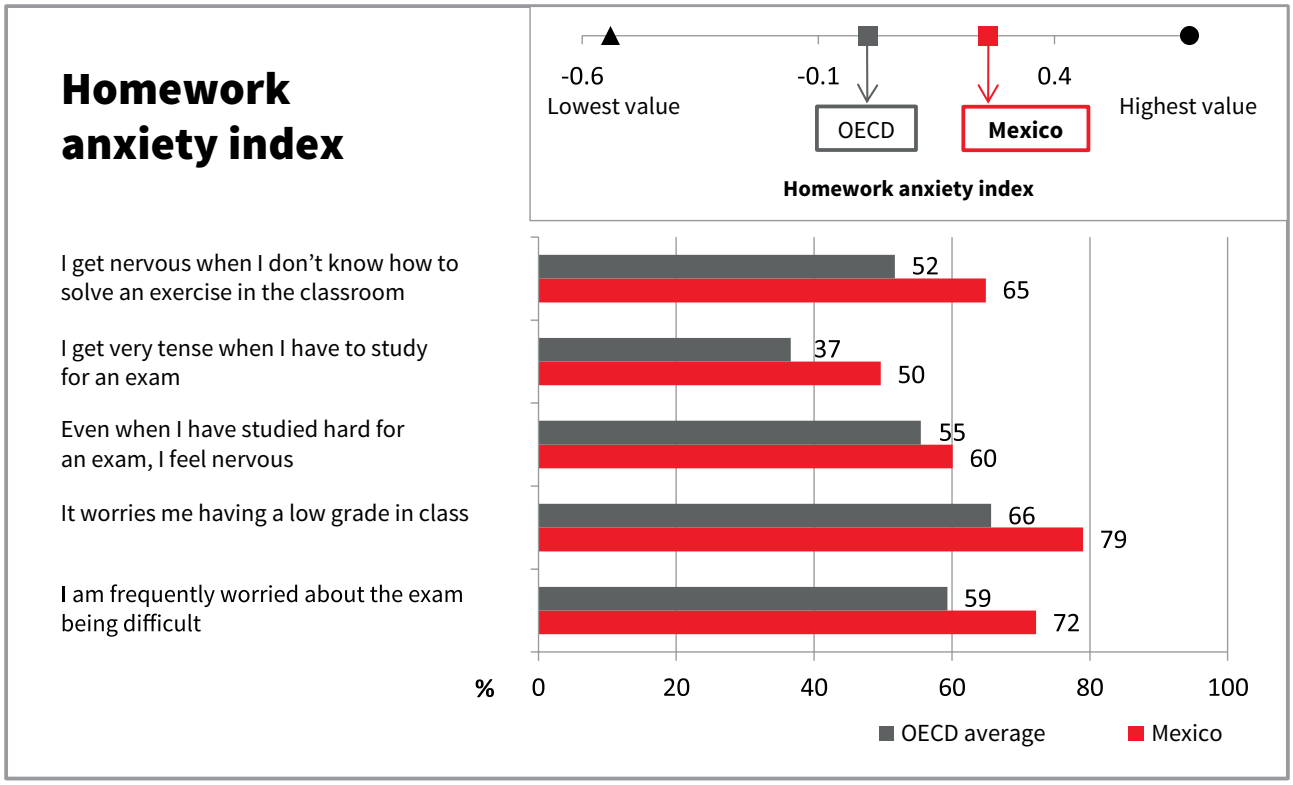

Table 1: Schoolwork-related anxiety

Source: OCDE, 2017

Given students' general perceptions regarding tests and the possible implications of being assessed, it was deemed important that teachers inform students that PISA results do not reveal the names of either students or schools. It was also important to emphasize that their participation would help ensure that Mexico is represented in this international evaluation. Thus, the goals of the communications strategy included ensuring that the target students had a new perspective on the test, that they were aware that they would not be named in the results, and that they came to see that participating in PISA would reflect their effort and commitment to being part of a collective result for Mexico. In other words, that it was a matter of pride to have the opportunity to participate in an international assessment in which students from different countries would also be assessed.

The communications materials included radio spots featuring the voices of young females and males; a pop song that encouraged the students who were eventually chosen to take the test to answer it with enthusiasm and to participate for

Mexico; and print materials that were distributed to lower and upper secondary schools throughout the country. The graphic design of these brochures, postcards, and posters was fresh and youthful, with a warm colour palette in which crimson and orange predominated, set off against a lilac background that softened the intensity of the main tones. The information was presented in circles, labels, and a sticky note to reinforce the content in a cheerful way and facilitate reading. The illustrations included Mexican and pre-Hispanic motifs: an alebrije—a colourful folk-art sculpture—, a snake, a compass, and an eye in which the iris symbolized the world.

Another element of the communications strategy was an informative electronic site that included frequently-asked questions, documents for download, exercises and trivia for students to challenge themselves. If they so desired, students could also seek help from their teachers to work as a team. To access this team-oriented section, students had to register, which made it possible to track which exercises were completed or abandoned most frequently and to identify which states had the highest levels of participation. The site also included contact details for the PISATEL helpline in case users wanted more information.

As part of the follow-up to the application of the PISA test, interviews with school administrators, teachers, and students in some lower secondary schools were recorded in order to evaluate the perceptions of the school community.

The campaign was effective. When visiting some of the schools at which the test was being applied, I met students in the hallways who glanced at the classrooms where their classmates were presenting the test and said, “I wanted to participate”. One student even asked me, “Then, I will never participate?” For some students, the test had become a source of motivation, and they wanted to be part of the collective effort that PISA now represented.

Education is a shared task, so it was important that all the actors in the educational community - involved— school administrators, teachers, and students — were accompanied and informed during the awareness-raising process so that they understood the message, internalized it, and successfully became change agents. To this end, the communications strategy played a key role in promoting commitment and a positive attitude towards the test and contributing to more effective implementation in schools.

Educational attainment, or student learning, is the true goal. However, the results of the various PISA assessments have shown that Mexican students have not developed basic competence in the knowledge and skill areas evaluated. It is thus essential to think about changing the education system. Recent efforts in Mexico have moved in this direction.

For instance, the educational model promulgated in 2017 presents a new pedagogical proposal entitled Aprendizajes Claves para la Educación Integral (Key Learning for a Well-Rounded Education). This model promotes student achievement and seeks to contribute to educating free, responsible, and well-informed citizens who are able both to exercise and defend their rights and to play an active role in the social, economic, and political life of the country.

It will take time for the new curriculum based on this model to be implemented effectively, but I am convinced that the best way to confront the challenges of today’s society is through quality education that fosters inclusive and equitable development. To achieve these goals, it is also necessary that education authorities and the diverse members of the education community work together to achieve better results in students’ academic performance and overall learning.

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Actors Holding the Government Accountable in Cambodia: How Can It Be Done?

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Summary

This article analyses the case of Cambodia and responds to UNESCO's Global Education Monitoring Report 'Accountability in education: Meeting our commitments' which suggests that various actors can hold governments accountable for their educational commitments. This would be quite difficult to do in Cambodia, where the government holds absolute power and has taken various actions to ensure that the media, civil society, teachers' unions, academic institutes, and voters in the country have little influence on the government.

Keywords

Government accountability
Global Education Monitoring Report, Cambodia
Autocratic country
Corruption

Introduction

The United Nations Educational, Scientific and Cultural Organization's (UNESCO) Global Education Monitoring (GEM) Report, entitled *'Accountability in education: Meeting our commitments'*, makes several significant and useful suggestions regarding how to hold governments accountable. It points out that accountability "starts with governments, which are the primary duty bearers of the rights to education" (UNESCO, 2017, p. 18), and suggests that the voice of the public, civil society organisations (CSOs), academic institutes, the media, and teachers' unions can all play important roles in holding governments accountable. It also acknowledges that, in some circumstances, these actors may not be able to influence governments as would be expected. One extreme case is observed in Cambodia, where people are "suffering at the hands of today's 'kleptocracy' authoritarians" (Heng, 2018). This paper describes how the actors that the GEM Report names are unable to hold the government accountable in Cambodia. That is, it shows a specific context that the GEM Report could not sufficiently address.

Education and Politics in Cambodia

In 2015, the World Bank redefined Cambodia's economic status as a lower-middle-income country, rather than a low-income country. However, the gap in the country between rich and poor remains, and access to education is still a considerable challenge for the poor people in the country (World Bank, 2018).

Although by law the government is responsible for all citizens' "right to access quality education of at least 9 years in public schools free of charge" (Education Law, Article 31), many citizens are not fully guaranteed this right. While Cambodia is on the verge of providing universal 6-year primary education, low participation in secondary education remains an issue; gross enrollments were 55.7% for 3-year lower secondary and 25.1% for 3-year upper secondary education in the 2016/2017 school year (MoEYS 2017).

The main barrier to school attendance is the financial burden on families. Families are often forced to make

unofficial and illegal payments to teachers, who are not paid well by the government; these payments include fees for required supplementary classes and bribes in exchange for good grades (Dawson 2009, Bray et al. 2016). Although the government has recently increased education expenditure, many families still suffer from this cost. Indeed, the GEM Report indicated Cambodia as the country in which the households' share of total education expenditure was the largest (that is, 69% in 2011) among the countries with available data (UNESCO, 2017, p. 284). In other words, the Cambodian government is not fully performing its role as the primary duty bearer of the right to education. Who can hold the government accountable for this?

The government of Cambodia is led by the Prime Minister, Hun Sen, who has been in power since 1985. He is notorious for his dictatorial government, poor human rights record, and corruption (Human Rights Watch, 2018). His family members have enjoyed an enormous amount of benefits, occupying significant posts in key public and private institutes such as police departments, courts, the parliament, the media, charity organisations (for example, the Cambodian Red Cross), and lucrative businesses. The officials of his party, the Cambodian People's Party (CPP), also enjoy privilege and wealth (Global Witness, 2016).

Recent political manoeuvers have enhanced Hun Sen's power, even though the CPP lost a significant number of parliament seats in the 2013 national election. While the CPP earned 48.8% of the vote, the major opposition party—the Cambodia National Rescue Party (CNRP)—earned 44.5% of the vote. These were the worst election results for the CPP since 1998. To silence the CPP's critics, the newly appointed education minister launched an educational reform (Khun, 2016; Phalla, 2016). This reform included provisions to prevent cheating on the national exam and increase teacher salaries and teacher training opportunities. Meanwhile, the CPP attempted to strategically eliminate any opponents running in the coming election in July 2018. In 2017, the CPP-controlled Supreme Court dissolved the CNRP and banned 118 senior CNRP members from participating in political activity. As a result, the CPP won all the parliament seats in the 2018 election without any real opposition, and Hun Sen declared that he intends to stay in power for at least another 10 years (see, for example, Hang 2018 for further information on Hun Sen's recent political manoeuvers).

In this political climate, not only politicians but also the actors that the GEM Report identifies as being able to hold the government accountable for providing education, have been attacked.

Media

The media has been attacked in a particularly severe way by the Cambodian government. Before the election, the government removed several independent radio stations from the air and shut down numerous newspapers. This included the closing of a newspaper written mostly in English, The Cambodian Daily, which was well-known as "one of Cambodia's utmost stridently independent newspapers" (Tostevin & Prak, 2017). Indeed, The Cambodian Daily often tried to hold the government accountable for education. The media coverage included articles like "Ministry Should Improve Public Schools, Not Close Private Ones" (Clairmont, 2014), "Teachers deserve better pay than a few bags of rice" (Pheng, 2014), and "We Need to Discuss How Corruption Negatively Affects Students" (Phoak, 2014). Shortly before the election, the websites and social media accounts of some independent media organisations were also blocked by the government (Prak, 2018).

Civil Society

CSOs and social activists are also oppressed in Cambodia. In 2015, the government enacted the "Law on Associations and Non-governmental Organizations (LANGO)", which allows the government to unjustifiably control and censor CSOs' activities. Under LANGO, some CSOs were closed or suspended without reason. Some activists and CSO members who were deemed critics of the government were arrested and/or forced to leave the country (Human Rights Watch, 2018). The worst-case was the murder of the political and social analyst, Kem Lay, who was a well-known Cambodian critic of the government's corruption and human rights violations. He also criticised the government's education policies. For example, in 2012, he pressured the government toward educational reform by publishing his team's survey report on rampant exam cheating in the national examination (Kem et al., 2012). The report revealed that many teachers received bribes from exam candidates in exchange for allowing them to cheat on the exam. Although Kem Lay suggested that the government improve teachers' ethics through appropriate remuneration, the ministry's high official did not pay much attention to the report (Chhay, 2012). Later, in 2016, he was assassinated after he severely criticised the enormous wealth of Hun Sen's family in the media (Human Rights Watch, 2018).

Teachers' Unions

The government has also targeted the Cambodian Independent Teacher Association (CITA), which is the largest teacher union in Cambodia. CITA has actively condemned the government's policies and practices, and has been especially harsh in calling for the government to increase teachers' salaries. However, the government has criticised this organisation's leader and members, claiming that they are

not politically neutral (Titthara & Worrell; 2014; Yon & Daphne, 2018). Moreover, in public schools, almost all principals are CPP members and teachers are often forced to join the CPP (Yi, Pheng, and Lowrie, 2003). In such an environment, CITA's power over the government is limited.

Academic Institutes

Local researchers are also not able to effectively pressurise the government since academic freedom is not ensured in Cambodia. Research and discussion about political and social issues among university professors and students are heavily restricted. For example, one of the state universities, Royal University of Law and Economics, prohibits students from conducting research about 14 politically sensitive topics, such as land disputes, labour disputes, and the Cambodian Red Cross (Cambodian Center for Human Rights, 2013). Although there is no obvious external pressure from the government, self-censorship and fear of revenge discourage most academic institutes from conducting research on important political topics. Furthermore, it is difficult for researchers to access reliable government data since authorities attempt to hide negative information and may even threaten those who ask for it (Pou et al., 2016).

The Public

The voice of the public has also been silenced during elections and social movements. The 2013 election showed citizens' dissatisfaction with the government's lack of accountability. This was especially true among the young generation, which had a particularly high voter turnout. In fact, at the time of the 2018 election, post-Khmer Rouge baby boomers occupied about half of the total registered voters (Chansopheakvatey, 2018). It was expected that since these young people were less tolerant of the government's corruption than their parents' generation, they may be a driving force in holding the government accountable (Khun, 2016; Wilson, 2016). It was also expected that their attitudes toward the government may influence their parents since their parents accepted that their children were more highly educated and informed (Wilson, 2016). However, as the election approached, individual voters gradually grew reluctant to participate in anti-government protests and discuss political issues, since they observed that their peers, even Cambodians overseas, were being threatened by the government with arrest and blocked on social media (Chansopheakvatey, 2018, Whitehead, 2018). As a result, many chose the status quo.

Conclusion

Due to the absolute power of the government in Cambodia, the suggestion made by the GEM Report that various actors hold the government accountable is not easily workable. If these actors were to read the GEM Report (which has been translated into Cambodian), they would all critically say, "We know our roles, but how can we actually perform them?" Meanwhile, the government would probably either display no interest in the GEM Report's suggestion or highlight what, referring to Dahlum and Knutsen's (2017) work, the GEM Report briefly pointed out: "education quality can be high even in societies lacking democratic governance and adequate attention to public opinion" (p. 22). Dahlum and Knutsen (2017) point to Cuba as a specific example (p. 193). Could Cambodia become such an autocratic country that provides quality education? We may need to discuss how the government can be held accountable for educational commitments even without democracy.

It is not possible for the GEM Report to individually address all possible educational contexts, but this paper has attempted to at least illuminate one of them. Extrapolating from Cambodia's situation, future research should focus on how governments can be held accountable in autocratic countries, especially since democracy today is increasingly in crisis throughout the world (Levitsky & Ziblatt, 2018; Mounk, 2018; Snyder, 2018).

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Part 4

International Experiences on Global Reports' Impact

Global Monitoring Reports and the Role of Socialisation and Learning: The Case of The OECD Impact on Sweden

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Summary

This article[1] suggests that the Organization for Economic Cooperation and Development's (OECD) education policy work of the last 20 years has achieved a paradigmatic shift in the thinking and framing of education; however, this process was not exclusively based and dependent upon the cold rationality of numbers. Crucially, as this article will show, it has also involved processes of socialisation and learning. It uses the case of Sweden to illustrate this argument, a country that displays an unprecedented unanimity of the policy and academic communities in regard to the indispensability of the OECD as an education policy expert and actor.

Keywords

OECD
Socialisation
Policy learning
Sweden
Governing

Introduction

It is well-documented that the OECD has become a key education policy actor globally, primarily through its construction of a commensurable transnational education space (Grek, 2009; 2010; 2014). Given the policy implications that its Programme for International Student Assessment (PISA) project has had for systems worldwide, it is widely accepted that it is OECD's technical capacity to decontextualize and compare that became the primary force behind its success (Martens, 2007; Lingard & Grek, 2007; Grek, 2009). Within this context of increasing and deepening academic analysis of the OECD numbers' influence, this paper wishes to offer an alternative interpretation of their success.

Although the significance of the efforts for making a more technical shift on many political debates in education cannot be disputed, the paper[2] focuses on a less-discussed yet important factor of the OECD success; this is the socialisation of policy actors within national contexts through processes of policy translation and contextual adaptation (Checkel, 2005). As suggested by Checkel (2005), processes of socialisation entail intensive communication, regular meetings, as well as the development of mutual trust and shared commitment between actors who are involved in the 'common project'. Socialisation leads to the construction of a common *esprit de corps*, defined by Meyer (2005) as the acceptance and internalisation of new norms: 'the right thing to do'. This, of course, is not always an orderly, observable sequence of events. Instead, it is a gradual, multi-layered process that is predominantly governed by a *logic of appropriateness*, meaning the adoption of institutional rules and norms that 'regulate the use of authority and power and provide actors with resources, legitimacy, standards of evaluation, perceptions, identities and a sense of meaning' (Olsen, 1998, p. 96). As we will see in this article, what we observe in Sweden is the construction of an almost absolute and indisputable consensus on the role and significance of the

OECD as key in reshaping the academic, policy and public debate. Observing and evidencing processes of international and national actors' socialisation as they take part in these institutional processes is considered a productive empirical resource in making sense of these new realities.

Over time (and the allowance of time is crucial here), international comparative assessments have created two crucial governing constructs: first, a common *language* in which diverse actors from the local, national and international 'levels' can communicate; second, a new governance system which in effect can be understood as 'an incremental process reorienting the direction and shape of politics to the degree that (global) political and economic dynamics become part of the organizational logic of national politics and policy-making' (Ladrech, 1994, p. 69). However, rather than top-down, this is a mutually reinforcing process; Sweden was a key nation in establishing the work of international actors in education, like the International Association for the Evaluation of Educational Achievement (IEA) and the OECD, and is very active in relation to European governance in education more generally (Grek & Lindgren 2015).

Actors' Voices: An Internal Perspective of OECD's Influence in Sweden

Seven key actors were interviewed for this analysis. These actors were education ministry representatives, academics, National Agency of Education officials and actors from headteachers' associations; all of them were interviewed in the period from October 2016 to March 2017. As we will see below, there is unanimity in suggesting that the OECD has become the golden standard of education research in Sweden, at the expense largely of national education researchers who were seen as of lesser quality and relevance. Secondly, although they do not often use the term 'crisis', they all agree that PISA has become a legitimate source of evidence of the declining quality of Swedish education and that the OECD offers necessary recommendations for change. Finally, they refer to the rise of the involvement of a wider variety of policy actors, from other fields, like economists or legal experts, who were seen as indispensable for legitimizing and symbolic reasons.

Although they do not themselves use the term socialisation, all interviewees in their interpretation of the influence of PISA in Sweden, offered a similar story of staggered events that led to one another; of the involvement of an ever wider set of actors; of the importance of the OECD experts in offering suggestions; and of the central role of the establishment of the Swedish School Commission as a form of meeting, debate and learning for all the actors involved. Indeed, the title of the report of the Swedish School Commission, 'Samling för Skolan' (Gustafsson, 2017), denotes precisely the notion of 'congregation' or 'gathering' – the meeting and consensus of different actors around the core of the commission's study, which were the OECD numbers themselves. Numbers and data are central in the interviewees' narratives, but so are the meetings, the debates, and the continuous coming together of actors in socialising and learning events.

Interestingly, perhaps simultaneously with the rise of the OECD as the ultimate go-to education expert, they all discuss the slow decline of Swedish education research as valid and trustworthy enough to even contribute to the PISA data collection process – instead, Andreas Schleicher has acquired an almost divine quality that matches closely the religious adherence to PISA in Sweden: 'when Andreas Schleicher is in Sweden it is like we have a visit from God, it is very strange. I think this is problematic' (Grek, 2019).

What is important here are two developments that seemed to have dominated the Swedish education policy scape since 2000; the first one was the unequivocal rise of the OECD as the golden standard of education research in the country (with, as mentioned, the simultaneous downgrading of national education researchers); and second, the rise and broadening up of a debate about a system that was portrayed as in crisis. This picture, given the history of Sweden as a model European education system throughout the 20th century, in addition to the success of close neighbours, such as Finland, became symbolic of a marked shift in the need to socialise and 'educate' all relevant actors about the critical need for changing. That process began slowly since the mid-2000s but became cataclysmic after the damning PISA 2012 report. It was that one that became the primary reason for launching the Swedish School Commission in April 2015. The debate within the Commission was very closely associated with the OECD data. The OECD and its recommendations were central to their work and in many ways, framed it. Interestingly, the Commission was persistently staffed by a broad range of actors that met regularly in a process of learning, socialization and translation of the OECD recommendations to national policy.

The Swedish School Commission had a life span of two years. Interviewees described these meetings as learning opportunities for all participants involved. They described the Commission as broadly reflecting the wider public and policy debate in Sweden and suggested that its priority is to take the time necessary to offer a 'Swedish solution', nonetheless following closely the OECD research and recommendations. Again, in their narratives, they never claim that the OECD data are not central; in fact, PISA data are the glue that holds them all together. However, they do also suggest that the national filtering process that is happening through their meetings is necessary for the interpretation, adaptation, persuasion and at the end adoption of the OECD perspective.

Socialisation and Learning in Governing: The Case of Sweden

This short paper began the analysis by suggesting that the OECD has become a transnational education actor *par excellence* in the field of education – however, the reasons behind this global reach and influence are not always clear. This paper showed that, rather than simply offering what has been seen as fast policy solutions (Lewis & Hogan 2016), the OECD meticulously enters national sites and works with local actors to create conditions of belonging. There could not have been a better example than the set-up of the Swedish School Commission with a remit to study the OECD PISA data and OECD country review report in detail and offer recommendations for reform. National actors are equally central in supporting and sustaining these processes. Indeed, some of the interviewees, even when critical of the OECD work, were ready to acknowledge that the OECD sparked a debate that would not have happened otherwise. However, it is important to also note that the debate was not as wide-ranging and diverse as it appears: the PISA data and the OECD review of 2015 have always been at the centre of all analysis. In fact, what this paper showed is that progressively since the mid-2000s the OECD became an undisputed expert organization and indeed, as a couple of interviewees suggested, a 'production force'. Close and sustained work with the Ministry, in combination with touching a nerve with the Swedish public (with quotes by Schleicher, such as 'Swedish schools having lost their soul) were key ingredients of this success (Orange, 2015).

What is perhaps more interesting in policy analysis terms, is the progressive layering and imbrication of a number of OECD events and experts who have been coming back and forth to Sweden for the last decade. The meetings and exchanges go far beyond the limits of a small circle of elite policymakers and experts. The Swedish country review of 2015 inspired a debate that included not only policymakers but also academics, teachers and the media. In the case of the OECD and Sweden then, ironically perhaps, 'governing at a distance' (Cooper, 1998) appears to require a strange sense of proximity: arguably, these conditions of actors' socialisation and policy translation are necessary for the kind of paradigmatic policy shift we witness in Sweden today.

Endnotes

1. The article draws on research in progress on the project 'From Paris to PISA: Governing education by comparison, 1867-2015, funded by the Swedish Research Council (Vetenskapsrådet) (2015–2018).
2. For a fuller analysis and discussion of the findings, please read Grek, S. (2017). Socialisation, learning and the OECD's *Reviews of National Policies for Education*: the case of Sweden, Critical Studies in Education, 58:3, 295-310, DOI: 10.1080/17508487.2017.1337586.

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Constructive and Coercive: The Impact of Global Reports on Education Policy

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Summary

This article analyses the impact of education policy recommendations based on global reports and international assessments in the Mexican educational reform agenda. Based on the analysis of the most recent case of education reform in Mexico, the article shows the way in which the reports' and assessments' recommendations have built a large-scale education reform in 2013 which, five years later, remains in suspense, precisely because some consider it as an imposition of several multilateral and international organisations.

Keywords

Educational policy
Education reform
Globalisation
Accountability
Standardisation
Evaluation
Mexico

Introduction

The impact that global reports and international education assessments have on the educational reform agenda at the national level in different countries is undeniable. For several decades, these documents have provided a wealth of information that has been used as a reference to guide the design of education policies around the world. In terms of statistical information, the Organisation for Economic Co-operation and Development's (OECD) education outlooks (2012 and 2017) have provided periodic indicators to measure the evolution of education systems. Likewise, the United Nations Educational, Scientific and Cultural Organization's (UNESCO) Global Education Monitoring Reports (2016, 2017/2018) have made it possible to assess compliance with the Sustainable Development Goals. If we add to these the reports by the World Bank (IBRD & World Bank, 2018), we can undoubtedly conclude that today we have a plethora of data to improve education.

The usefulness of these international reports and assessments lies in the fact that the information they have provided has made possible to increase transparency and accountability. Because they are aligned with a reform agenda linked to quality education and to amplifying the voices of the less privileged sectors, the generation of indicators has given a new meaning to the relationship between citizens and authorities, making it equivalent to the relationship between customers and suppliers, especially in developing countries' contexts (Bruns, Filmer & Patrinos, 2011; Banco Mundial, 2003; Read and Atinc, 2017; Tamatea, 2005).

Although this education reform agenda has had a constructive spirit, there are those who point out that their proposals have been harmful. From the perspective of those who embrace the Global Education Reform Movement (GERM), global reports and assessments "pass on and infect the health of education systems like viruses in an epidemic" (Sahlberg, 2012). According to this perspective, the use and expansion of administrative practices and decisions associated with the new public management have led to

the adoption of toxic measures that have standardised teaching and learning, as well as privileged mastery of some skills (verbal and mathematical) to the detriment of others, especially those related to art and humanities (Henry et al., 2001; Grimaldi & Serpieri, 2014; Sahlberg, 2016; Parcerisa & Falabella, 2017; Verger, Parcerisa & Fontdevila, 2018).

Construction and Destruction: The Education Reform in Mexico

How disturbing can the impact of such reports and assessments be to a country's national policy? In a country like Mexico, in which information on the performance of students in national and international assessments was treated as a state secret until the transition to democracy in 2000, the decision to make public the results of Mexican students in assessments like PISA shocked the system. In 2002, the National Institute for the Evaluation of Education *(Instituto Nacional para la Evaluación de la Educación, INEE)* was created to provide transparency and accountability in the education sector. It became a repository for reports and assessments and, later, an organiser and implementer of international learning assessments.

So, are there reasons to suppose that international reports and assessments are hiding behind the intention of disappearing INEE and the Professional Teaching Service, *(Servicio Profesional Docente, SPD)* as recently announced by the new president of Mexico (Roldan, 2018)? If we analyze the education reform of 2013, it is impossible to avoid the imprint of global reports and international assessments. To begin with, the publication of the results of Mexican students in international assessments such as PISA for more than fifteen years has paved the way for education to play a leading role in the 2012 presidential election, one that led to the creation of SPD and the granting of constitutional autonomy to INEE, both in 2013.

Likewise, there is no doubt that the recommendations of the OECD and the Inter-American Development Bank (IDB) influenced the design of the 2013 reform. Although these recommendations were not part of global reports, their connection with the discourse in favour of quality, transparency and efficiency is unquestionable. For example, in 2006, the IDB (BID, 2006, p. 13) pointed out that the low quality of the education system was a product of the "limited professional competencies of teachers». In 2010, the OECD (OCDE, 2010, p. 10) called for the implementation of teacher performance assessments, laying the foundations to the creation of SPD, the most important institution that the reform established to, at least in the discourse, set the criteria for entry and mobility in the teaching service.

How is it possible that the SPD is compromised five years after its creation and that, at the same time, the new president of Mexico is contemplating the disappearance of INEE? If we consider that the entrance to the teaching profession and the promotion to management and supervision positions before the reform were dependent on the loyalty of the teachers with the National Union of Education Workers *(Sindicato Nacional de Trabajadores de la Educación, SNTE)* (Sandoval, 2016; Ornelas, 2008 and 2010, Muñoz, 2008), it is possible to measure the impact that the establishment of competitive examinations and compulsory teacher performance assessments entailed for the education system. Actually, the fact that the educational reform is being questioned is not a coincidence, but rather a product of the interests that the reform affected and the way in which various political actors have capitalised on teacher discontent.

As the education reform was also of a political nature since it reconfigured the corporatist link between the State and the SNTE (Rojas, 2018a), its implementation has faced serious difficulties, especially in Chiapas, Guerrero, Michoacán and Oaxaca; entities that make up the bastion of the National Coordinator of Education Workers *(Coordinadora Nacional de Trabajadores de la Educación, CNTE)*, SNTE's dissenting wing. These resistances are not minor, since, according to my calculations, at the current rate, the mandatory performance assessment of all teachers will take, instead of four years as set by the law, around a hundred years in Oaxaca and in Michoacán, mostly because many teachers conceived the reform as a punitive measure that violated their labour rights (Sánchez & del Sagrario, 2015).

Hence, the -at the time- presidential candidate, Andrés Manuel López Obrador, has taken advantage of this situation by capitalising on the teachers discontent and promoting an education reform agenda focused on the disappearance of the SPD and even INEE (León, 2018). These proposals, however, are no longer mere campaign pledges (Rojas, 2018b). If we analyze the initiatives that the Morena party legislators -the elected president's political party - have presented in the National Congress, it is possible to grasp how global reports and international assessments have been used to justify the decision to dismantle what was built in 2013. For example, Deputy María Chávez's initiative (2018) proposes to cancel the reform because it is an "anti-national project" that aims to transform education into a space for diffusion of the "new labour culture" that transnational companies, the World Bank, the International Monetary Fund and the OECD promote (Chávez, 2018, p.2).

Conclusions

The recommendations arising from global reports and international assessments are double-edged swords to the construction of a sustainable reform agenda for developing countries. On the one hand, without the information they provide, education can hardly be part of the public agenda. On

the other hand, when implementing these recommendations, if neither a real dialogue with the actors involved is prioritized nor technical capacities are strengthened, the discontent that the new policies will cause will lead to counter-reforms that can erase what is apparently set in stone, such as the constitutional reform that Mexico promoted in 2013 and that, very likely, will become history soon.

Nevertheless, the information that emerges from global reports and international assessments is not harmful or disturbing by itself. On the contrary, its constructive or coercive nature depends on the reading that actors make of the published data and the policies they formulate based on them, as well as on the way in which they implement the general and specific recommendations emerging from those reports. As generic prescriptions ignore the context in which education policies are formulated and implemented, it is increasingly important to develop specific recommendations that complement those that are stated as global benchmarks and indicate routes to ensure adequate implementation in the medium and long term.

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Government Actions that Seek to Influence PISA Scores: Field Experiences from Oaxaca

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Summary

This article presents an educator's first-hand perspective on the publicity-based strategy undertaken by the Mexican government in 2009 in relation to the PISA tests applied that year. Ostensibly meant to increase awareness of the PISA evaluation, the underlying objective of this program seems to have been to increase test scores. The key components of this strategy included supplying study and teaching materials, and offering teachers and students free registration to videoconferences and online preparation courses hosted on private-sector education platforms.

Keywords

PISA, GEM Reports
Oaxaca
Mexican Government
SNTE
Educational Gaps

This article presents the first-hand experiences of high school teachers and principals when applying an international evaluation test, the Programme for International Student Assessment (PISA), in their schools. Perhaps the most popular of the international learning assessments, PISA has been applied in Mexico every three years since 2000 (Aguilar & Cepeda, 2005). In this article, I present my experience and observations as a teacher and principal in relation to the test applied in 2009. At this time, I was working at a private high school in the Isthmus of Tehuantepec, a region in the southwest of the Mexican state of Oaxaca, where I worked from 2007 to 2012. This article presents a testimony regarding the application of this test in a state that, according to official reports, is consistently within the last three places in terms of educational quality (Díaz and Flores Vázquez, 2010). Oaxaca is one of the three poorest states in the country (De la Torre García, 2016). At many levels, the state is complex: it is comprised of eight geographically diverse regions and 506 municipalities, some of which are very isolated, and home to approximately 18 indigenous peoples. This report on field experience is intended to offer elements that could serve as an example for other research, statistical, or interpretive studies that focus on the Global Education Monitoring Reports (GEM Report) and their effects.

In 2009, a number of Oaxacan high schools, including the one I worked at, received an email from the State Institute of Public Education of Oaxaca (IEEPO) announcing both the implementation of the PISA test that year and the fact that the school had been chosen as part of a representative sample of the diverse (and distant) regions of Oaxaca (Quadratin, 2009). When, by chance, I learned of the invitation, I shared my excitement and desire to participate with the school's director and asked that we make the respective arrangements to confirm our registration.

Although I was excited that an international assessment like PISA could be accessible in this relatively isolated region of Mexico, the director showed little interest. In fact, he was rather indifferent and mentioned that he considered PISA to be an assessment made *by and for rich countries, one which*

does not reflect the educational reality of remote and culturally diverse Mexican regions such as ours. However, he agreed to have the school participating. When I informed the teaching staff of our registration, I encountered total ignorance of the nature, application, and significance of PISA. In trying to clarify the scope of the assessment, I only managed to generate a sense of anticipation among my colleagues, who wondered if something, in particular, would befall our school.

Once participation was confirmed, representatives of the schools were asked to attend an initial information session in the state capital of Oaxaca at the local campus of a chain of private universities, the National Institute of Technology and Higher Education of Monterrey (ITESM) (SEB, 2011). At the meeting, I recognized several administrators from other schools in my region (Isthmus), and I noticed a common pattern in the type of schools that had been convened: all were institutions that were talked about positively, that enjoyed a certain prestige due to their educational quality, and at which most students achieved the desirable graduation criteria.

The first session was given via videoconference through ITESM's distance education network (Bécalos, 2009). Most information, in fact, was provided via videoconferencing; we received little information in writing. What immediately caught my attention was the tone in which the speeches were made: gentle, with patience, and with a clear orientation towards achieving results. During the session, the moderator, a federal government official responsible for in-service teacher training, presented a conceptual overview of educational assessments in general and of the PISA test in particular. PISA was discussed in terms of its origin in the Organisation for Economic and Co-operation and Development (OECD), its diagnostic characteristics, the type of test items it uses, the information it collects, and the meaning of its scores (SEB, 2011). The emphasis on content and construct was evident in the fact that the presentation included a comparative table of what PISA does and does not evaluate (SEB, 2011).

In the same session, direct emphasis was placed on the key procedures involved in answering the test correctly. We were told that the test items should be solved by the students in an unconventional way. In other words, that PISA is quite distinct and that the items it includes are far from the traditional concept of an exam as a test of memorization or sets of elementary testing exercises. We were told that, because the type of answers typical of conventional exams did not represent what a PISA test required, our students would need to become familiar with test items of the "PISA type" (Pólito Olvera et al., 2011). It was, therefore, pertinent for students to practice specific procedures to prepare for PISA. For example, for reading comprehension and text processing, three key variables were shown: 1) retrieving information from writing, 2) interpreting the text, and 3) making value judgments about the text and/or relating it to situations from daily life (Falabella, 2008).

At this point in the videoconference, recurrent clarification was made that we were at the session to learn how to boost the capacity of our students to complete the evaluation by familiarizing them with the PISA-type questions, in particular, reading because the PISA 2009 test would emphasize reading comprehension over mathematics and science (Aguilar, 2005). We were told that schools would receive manuals for students and teachers (Falabella, 2008), in both print and digital formats, so that teachers could have students work through practice exercises and consult specific references. An online course for teachers would also be offered to increase knowledge about PISA and to exert a positive influence on our educational practice. When we took this online course, there was clear indication that we were being trained to understand the test and that, due to the characteristics of PISA, it was not necessary for our students to "study" for the test in a conventional way, but rather to show their acquired abilities (SEB, 2011).

At the end of the videoconference, it was announced that there would be prizes and gifts—including, for example, tablets and music players— for the students who obtained the best score, information that proved to be false because PISA is anonymous and does not reveal the personal data of test-takers. The test was presented as a "celebration", and we were encouraged to publicly announce, by all possible means, that our school would participate in this test *just as if it was a celebration*.

An interesting question was raised during the videoconference when a participant indicated that he did not agree that the efforts were focused only on obtaining expected results on the test. He pointed out that, in 2000, test takers in Mexico had not obtained the scores required to achieve level 1 of the PISA standard (Vidal, 2003), something that could be interpreted as equivalent to obtaining a level zero. The comment was accepted by the mediator and led to her explaining that the target, which was to be reached with our help, was for students to obtain at least 200 points to achieve the immediate goal: attainment no lower than level 2 of the PISA standard (SEB, 2011).

A second meeting was later held to present the digital platform through which we, as teachers and school authorities, would be trained and familiarized with the nature of the test and PISA-type test items. It was specified that the costs involved with the use of the platform would be covered by a scholarship from the Bécalos Foundation, which was granted to teachers who applied the PISA test

(Bécalos, 2009). After having been given access codes and an orientation to the operation of the platform, we were once again encouraged to "celebrate" what this assessment could represent and its relevance for the diagnosis of educational attainment in Mexico. As an incentive, we were told that the most responsible teachers, those with the best results in the use of the platform, would be invited to an international training experience: a summer course at a university in Spain (ESMAVALLES Noticias, 2011). In the following months, teachers completed weekly training activities that reproduced and explained the "PISA-type" exercises. We submitted homework by email and received feedback from teachers working through the virtual platform.

Finally, the test day arrived. As is common practice in Oaxaca, a person hired only to apply the test arrived at the school with the evaluations in a sealed packet and the list of students who were to participate. This list was based on the official Mexican population registry (CURP) and included those students who were 15 years old. We separated these students into a special room and the test was solved during the scheduled time without the presence of any teacher or other witnesses; only the specially-hired examiner remained with the students. The director of the school was required to complete a questionnaire, which, I observed, was related to infrastructure, teacher training and other aspects of school management. The test was carried out without incidents.

After the test, we awaited the results. At a teachers' meeting, I mentioned that it seemed important that young people from remote regions participated in the PISA test and that their participation should prove to be of favourable importance in providing information about the students in our region. However, we did not hear anything about the results until the OECD report was issued the following year and we observed that, once again, the state of Oaxaca was "statistically below average" (Díaz & Flores, 2010, 69), with the fourth-lowest level of educational quality in Mexico (Díaz & Flores, 2010).

In conclusion, I would say that this experience showed that the federal and state ministries of education were "under pressure" to ensure that the score on PISA 2009 was no lower than the one obtained in the previous application in 2006. The subtle pressure and the need for achievement that these ministries manifested in the face of the PISA test were evident. Even their success strategies were based on media more akin to advertising than to education. Unlike other initiatives that have used regulatory rigour to signal performance based on obligations (SEB, 2011), in both videoconferences and printed materials (Pólito Olvera et al., 2011), a nationalist discourse with accessible and cordial language could be observed. This discourse made the application of PISA and preparation of students to do well sound like something achievable.

All this occurred in a region in which public education is largely controlled by Section 22 of the National Union of Education Workers (SNTE) and the National Coordinator of Education Workers (CNTE), two of the groups most reluctant to comply with government initiatives. On this occasion, there was no outright opposition such as that which later occurred with the application of a student assessment programme designed by the Federal Ministry of Education (PLANEA) or teacher evaluations (Ornelas, 2013). Unfortunately, the extent and efficiency with which public and private resources were coordinated to improve PISA scores is unlikely to be replicated to address similar or even more pressing education needs in the state of Oaxaca, including, for example, coverage, educational infrastructure, management, teaching, and access to resources and teaching materials, among many other longstanding shortcomings in education. Thus, it is important to ask why was it possible to create and implement an extensive promotional apparatus to apply the PISA test in all regions of the state of Oaxaca, and why had it not been possible to implement similar strategies to meet the evident needs and close significant learning gaps in Oaxacan schools and among its youth.

The reflections recorded here reflect my experiences as a teacher and school administrator in the Isthmus of Oaxaca. Today, eight years later, from the perspective of a school principal working in the state of Querétaro, I continue to observe the evident effects that the PISA evaluation has had on education in Mexico.

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From Tolerance to Total Rejection: Dissidence Among Teachers in Oaxaca and the Application of Standardised Assessments, 2008-2013

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Summary

This article presents an example of how Mexican authorities and national NGOs used the results of international and national standardised assessments to justify constitutional reform in the field of education in 2013 and discusses the ensuing reaction. In the state of Oaxaca, Section 22 of the National Union of Education Workers (SNTE) opposed the introduction of standardised assessments of teachers and students and extended its resistance to the application of any type of assessment. The conflict between government authorities and the union affected the legitimacy of both the government and standardised assessments. The case of Oaxaca is an example of how changing political circumstances proved stronger than the will of the government to promote the 2013 education reform.

Keywords

Mexico
Oaxaca
Standardised assessments
Education reform
SNTE

In Mexico, the application and results of assessments related to both the Programme for International Student Assessment (PISA) and the National Evaluation of Academic Achievement in Schools (ENLACE) triggered a series of reactions in civil society and among education authorities that led to the Constitutional Reform of 2013, a reform which introduced significant modifications to the national education system. At the same time, in certain states of Mexico, including Oaxaca, the local political conflicts and the reaction of the teachers' union to these assessments' results closed the door to further testing. This short article offers a brief explanation of how attitudes towards these tests moved from tenous tolerance to belligerent obstruction.

The state of Oaxaca is marked by a complex terrain that has contributed to it having the highest number of municipalities (570) and settlements (close to 11,000) in Mexico. Oaxaca also has the highest proportion of indigenous speakers in the country - 32.15% of its total population. This pattern affects schooling: 26.85% of children between the ages of 3 and 17 speak an indigenous language. Within the state, the average years of schooling completed by the population over 15 years old, 7.4, is low in comparison to the national average of 9.1. Among the indigenous population, the average is even lower: 5.5 years (INEGI, 2016).

While years of schooling may be low, the size of the Oaxacan education system is staggering. In 2015, Oaxaca had 13,973 schools, 74,343 teachers, and 1,256,110 students, figures that include from basic education to higher education in all its forms. In the 2015-16 school year, 33.97% of students were enrolled in pre-school; 40.26% in primary (grades 1–6), 17.79% in lower secondary (grades 7–9), 5.22% in upper secondary (grades 10–12), and 1.38% in postsecondary programs (SEP, 2019).

Educational outcomes in Oaxaca have received strong criticism from civil society organisations such as Mexicanos Primero (2016). In 2015, the graduation efficiency rate for

primary school in Oaxaca was 91.9%, for lower secondary 81.1%, and for upper secondary 61.8% (INEE, 2015). In terms of quality of education, however, the picture is unclear. In 2009, the last time PISA was applied in the state, of all the states in Mexico, Oaxaca had the sixth-worst performance in mathematics, with 59.2% of students performing at or below level 1. More recent information is simply not available.

According to the National Institute for the Evaluation of Education (INEE), for 2015, no data was available on the extent to which students in basic education had achieved the key learning outcomes established in the national curricula. This lack of data reflects the deliberate effort of Oaxacan teachers to avoid the introduction of national and international standardised assessments in the state and their opposition to the *2013 Census of Schools, Teachers, and Students in Basic and Special Education*. This opposition was based on the grounds that the application of these instruments constituted the prelude to a political intervention against them by the Mexican state (Del Valle, 2013). The suspicion that this strategy also corresponded to an attempt by local authorities, and the union itself, to cover up corrupt practices such as the duplication and sale of teaching posts, cannot be discounted either (Del Valle, 2015).

This lack of data is closely related to the particular political and union-related circumstances of teachers in Oaxaca. Since the early 1980s, Section 22, the state chapter of the National Union of Education Workers (SNTE), has been dominated by a dissident faction (Yescas Martínez & Yafra, 2006). Ironically, despite fostering decentralisation and transfer of faculties to the states, the first wave of education system reforms in the early 1990s strengthened local dissent (Méndez y Berrueta & Quiroz Trejo, 2010). In an attempt to pacify the union, the government of Oaxaca issued a set of resolutions known as the "1992 Memorandum", a document which acquired quasi-constitutional force in Oaxaca because it gave Section 22 power of veto over changes to the structure of the State Institute of Public Education and to state-level education standards (Vicente Cortés, 2006).

Since then, successive state governments have had variable luck in negotiating with the union, which quickly managed to expand its capacity to intervene in the hiring of professors and managerial staff within the state's education system. Despite their expanded influence, the teachers represented by Section 22 did not forego organising street demonstrations as a means of exacting negotiating with state and federal authorities (Estrada Saavedra, 2016). This conflict reached a peak after 14 June 2006, when the union broke with the state government and the latter carried out a disastrous attempt to evict the teachers who were protesting in the centre of the state capital. This failed attempt caused major social upheaval. At the local level, this unrest took on shades of a small civil war and ended only with the intervention of federal security forces at the end of the year. Acceptance of the application of the PISA 2009 test in 2008 can only be understood in this context of a relatively weakened union alongside state control underpinned by police intervention in the local education system.

This brief period of repression, however, had a negative impact on the union's opponents because it created the conditions for an alliance of dissident teachers with Gabino Cué Monteagudo (Bautista Matínez, 2011). After Cué became governor, from 2010 through 2014, this alliance empowered unionised teachers to the extent that they managed to promote an alternative proposal to the federal reforms focussed on assessment and quality of education. At the federal level, PISA results were used to justify the need for an education reform; in contrast, at the state level, the teachers' union in Oaxaca radicalised its posture and used its position of strength to block any attempt to reapply PISA in 2012.

Since 2009, Section 22 of the SNTE and the dissident union, the National Coordinator of Education Workers (CNTE), had spoken out against agreements between the national leadership of the SNTE and the federal government that opened the door to evaluation and standardised assessments. In Oaxaca, opposition to any such initiative had three objectives: to prevent the application of standardised tests, to continue using protests and work stoppages as a negotiation strategy, and to construct their own educational plan centred on the local community and union dominance of the education system. In the first two years of the alliance with the new government, this dissidence paid off and the dispute over the control of education in Oaxaca entered a hiatus. The Constitutional Reform of 2013, with its commitment to evaluation, brought this relative peace to a dramatic end.

Between 2013 and 2016, as the federal government attempted to implement standardised assessments and regain control over the bureaucratic structures of the national education system, the federal government and Section 22 clashed over control of education in Oaxaca. In the national media, the results of international assessments such as PISA were used as an argument to justify both the measures of force taken against the union and the need for knowledge tests and performance evaluations applied to teachers to determine which teachers should enter—and remain—in the nation's classrooms. In turn, this posture led to national and international evaluations becoming a taboo subject for a large part of teacher unionism and the left-wing opposition alliance, a coalition that would ultimately win the presidential elections of July 2018 (Moreno, 2018).

The new federal government is in the process of eliminating the labour-related consequences of teacher evaluations. However, it is not yet clear what role international assessments such as PISA will play in this new scenario. One possibility is that by returning to a dynamic based on consensual governance with the teachers' union, the government will depoliticise tests and evaluations and restore the pre-2009 conditions that made application of PISA possible in states such as Oaxaca. The Oaxacan case remains as an example of the dangers of politicising the results of international and national assessments without concomitantly generating sufficient democratic consensus to support any related public policy decisions.

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The Impact of International Studies and Reports on Education Policy in Chile

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Summary

This article examines education policy in Chile, in particular the reforms that took place from 2015 to 2018 to improve the education system in terms of social justice, school inclusion, and teacher quality. It also touches on the emphasis on market policies inherited from the military government (1973-1990) and the corresponding effect on the socioeconomic inequality of educational outcomes. In addition, it points out that critiques from international reports and assessments have led to the approval of laws that seek to establish a more inclusive system, with better-trained teachers and more adequate working conditions.

Keywords

Educational results and standardised tests
Selectivity versus school inclusion
Teacher training
Teacher career development

From 2000 onwards, the most important international sources that have had an impact on education policy in Chile are to be found in the tenets and reports of the Organization for Economic Cooperation and Development (OECD) and the results of comparative assessments in which Chile routinely participates: the Trends in International Mathematics and Science Study (TIMSS), the Programme for International Student Assessment (PISA), and those applied by the Latin American Laboratory for the Evaluation of the Quality of Education (LLECE). Rather than as direct drivers in policy formulation, the Global Education Monitoring Reports (GEM Reports) have also served as input for discussions on educational issues such as gender equity, teacher quality and training, or classroom inclusion. The influence of the World Bank guidelines that marked the policy discussions in the 1990s has been much less evident in subsequent decades. In this text, I describe recent educational legislation that attempts to address marked inequity in quality education in the Chilean education system and inadequacies in the working conditions and training of teachers. To this end, I indicate the main international sources that have contributed to the diagnosis of issues (OECD, 2004; OECD, 2014; Santiago, Fiszbein, García Jaramillo & Radinger, 2017) and the mechanisms designed to tackle these issues both within the state-financed education system and in relation to teachers' working conditions and teacher training.

Inequality in the Chilean Education System

Following Chile's return to democracy in 1990, a series of improvement programmes were implemented in the education sector. These aimed at strengthening education at the basic (primary and lower secondary) and upper secondary levels, improving teachers' salaries, increasing funding for training programs, updating the school curriculum, and supporting schools operating in disadvantaged socioeconomic contexts (Cox, 2003). However, these programs did not affect existing market policies, such as the per-student voucher financing system, and the effects this market orientation has had on attempts to achieve quality education "for all". In fact, in the early 1990s, market-based policies were exacerbated by the introduction of shared school financing,

which established a differentiated system for the operation of public schools and private schools receiving public subsidies. The latter was permitted to charge additional fees, but public schools, which are entirely free, were not. Thus, while public schools had to cover their operating costs with the per-student subsidy (voucher), private schools with state subsidies could receive additional contributions from families, which allowed them to improve teaching conditions. Additionally, unlike public schools, subsidised private schools could select their students. In other words, subsidised private schools had better-operating conditions than did public schools, which was reflected in better learning outcomes as measured by national standardised tests. This educational market situation contributed to a decline in enrolment at public schools - only those children from the lowest socioeconomic backgrounds remained. Families that could transfer their children from a public school to a subsidised private did so, and by 2016 the proportion of public schools in the subsidised school system had dropped to 39%.

In 2016, learning outcomes in Chile were strongly marked by the socioeconomic status of the students, which, in turn, was associated with the type of school they attended. To be precise, when correlated with the OECD's socioeconomic parity index, the reading and mathematics results of PISA 2015 identified Chile, along with four other Latin American countries, as having the highest levels of inequality among all the participating countries (OECD, 2017). As early as 2004, the perverse effect of market policies in the Chilean education sector had been foreseen by the OECD in the education-policy review it had conducted at the request of the Chilean government (OECD, 2004).

The consequences had also long been evident to the population. In 2006, frustration with an education system that failed to offer similar opportunities "for all" led to a series of student protests. From then on, governments made diverse efforts to address the most serious educational problems and their structural base. However, not until the beginning of the second government of Michelle Bachelet (2014-2018) were agreements reached to address the problems of quality education and inequality in the education system in a more comprehensive manner through legislation.

The Inclusion Law (20.845, 2015)

Following the principles set out in the *Education for All Global Monitoring Reports* (UNESCO, 2009) and recommendations made by the OECD (2004), the 2015 Inclusion Law focuses on two central goals. The first is to end the comparative advantages of state-financed private education; to this end, monetary contributions or additional payments from families are prohibited and financing is withdrawn from those establishments that obtain profits. In this way, the 2015 law affirms the principle of free, state-financed education for all regardless of a school's status as public or private. In addition, the law grants educational authorities the right to regulate the opening of new establishments so as not to increase the educational offer in places where coverage is already sufficient.

The second goal is to reduce socioeconomic segregation by type of school. To accomplish this objective, the Inclusion Law prohibits the selection of students on the basis of family background or results of an admission test. To implement this requirement, a centralised, online application system has been established. The system allows families to indicate up to three choices of school, and allocation is based on available space. Likewise, during the enrolment process, schools must accept all applicants until available spaces have been filled. The one exception is for art schools and secondary schools with a tradition of academic selection, which are still permitted to select up to 30% of their students. The Inclusion Law also prohibits, with certain exceptions, the expulsion of students due to low school achievement or disciplinary problems.

In essence, as the law states:

"The system will propitiate educational establishments to serve as meeting places for students with distinct socioeconomic, cultural, ethnic, gender, national, or religious backgrounds."

(Law 20.845, 2015; own translation).

Teachers' Working Conditions

Training and working conditions of teachers are central to achieving the 2030 Sustainable Development Goals, especially in relation to quality education. Although teacher training in Chile has been carried out at the tertiary or university level since the end of the 1960s, the quality of the various training programmes has been subject to ongoing analysis and critique. More specifically, a central problem has been that top-performing school graduates do not enter teacher training.

A review of teachers' salaries after 15 years of service found that salaries in Chile were substantially below the OECD average (OECD, 2017) despite the existence of economic incentives associated with school results, as measured by standardised tests and results of voluntary teacher evaluations about knowledge of curricular content, that had been established over the last twenty years. Teachers' workload, as calculated based on class size and the ratio of teaching to non-teaching hours, also compared unfavourably with the OECD average (OECD, 2017). In 2015, the average teacher-to-pupil ratio in Chile was 1:30, with a maximum of 1:45; the OECD average was 1:23. Likewise, the 75:25 ratio of teaching to non-teaching hours and the proportion of annual teaching hours did not correspond to either the OECD averages (2017) or the principles established in international documents such as the *2013/14 Global Monitoring Report,*

Teaching and Learning: Achieving Quality for All (UNESCO, 2013/2014). Moreover, although the public system had a performance evaluation for teachers, it was not aligned to career progression, nor was it applied to teachers working in subsidised private schools.

The Law on Professional Development of Teachers (Law 20.903, 2016)

By 2014, a coalition of different civil society groups had begun to discuss the working conditions described above and to prepare a major initiative aimed at emphasising the importance of teachers for the quality of education (Plan Maestro, 2015). Support for this crusade was drawn from the OECD report entitled *Teachers Matter* (OECD, 2005) and the *Global Monitoring Report* focused on teaching and learning (UNESCO 2013/14). Recommendations made by the coalition of civil society groups, in what is known as the Master Plan, and in these international reports, taken in conjunction with analyses carried out by Chilean educational authorities, contributed to the 2016 Law 20.903 focused on the professional development of teachers. This legislation introduces important improvements to teacher training and establishes a professional career path reinforced by good working conditions. In other words, the Law 20.903 responds to OECD's call "to attract, train and retain effective teachers" (OECD, 2005).

Regarding initial teacher training, this law establishes that such training must be provided through externally accredited university programmes and that the admission requirements for education degrees are to be increased gradually between 2017 and 2023. The quality of the training programmes will be monitored through external diagnostic tests to be applied in the penultimate year of training.

In terms of teachers' working conditions, the central element of the new law is the implementation of a five-stage career ladder. Three of these stages are mandatory; the other two are optional. In the first year of practice, new teachers must be supported by a mentoring process at the end of which they formally enter the first career stage. After four years of practice, teaching capacity and knowledge are assessed. Upon passing this evaluation, teachers may move on to the next four-year stage (the "early" stage) and then, after another four years of practice, to the "advanced" stage. These three stages comprise the mandatory aspects of the teaching career ladder. On an optional basis, teachers may also choose to be evaluated to advance through the two highest levels. In addition to the introduction of this career ladder, the law introduces a staged reduction in the ratio of teaching to non-teaching hours. In 2016, the ratio was established as 30:70 and in 2019 it is to be adjusted to 65:35. To attract better candidates for teaching, remuneration at the beginning of the teaching career was also increased by 70%. In addition, although evaluation criteria continue to be based on the existing general-skills framework, the contents of teacher performance evaluations at each stage of the career ladder have been expanded to include evidence of collaborative work with other teachers and parents, school leadership, development of curricular materials, research and innovations, and evidence of participation in professional development activities.

Conclusion

There is no doubt that the new Chilean legislation follows the recommendations of international organisations that high-quality education should be extended to all, especially those who are currently marginalised, and that it paves the way towards making schools more inclusive. To improve the overall quality of education, the legislation also increases the requirements and opportunities for teacher training and improves working conditions for teachers. These modifications are in line with international recommendations on establishing favourable conditions to meet the Sustainable Development Goal 4. However, to move effectively in this direction, Chile will need to foster the conditions that allow effective teaching in inclusive classrooms. Doing so will require support in the form of external training and greater collaboration of all stakeholders within schools. It will also require ongoing evaluation of progress and attention to problems with implementation. In this context, good school leadership and focused monitoring by educational authorities will be necessary to stimulate collaboration for learning among schools at local, regional, and national levels.

A more contested and still unsolved issue is the need to move from a system focused on market-based competition policies, one which is underpinned by the per-student (voucher) financing model and an excessive number of standardised assessments with consequences for schools. In this sense, international agencies need to be more proactive in showing the threats to equity and social justice that occur in educational systems excessively oriented by market principles.

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The Universalization of Secondary Education as a Mitigating Factor to Explain the "Low" Results on Standardised Tests in the Middle East and North Africa

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Summary

This article argues that the alarm caused by the decrease in science and mathematics results in TIMSS 2015 in the participating countries of the Middle East and North Africa is partially unjustified. The discussion and dissemination of these results rarely take into consideration the progress that has been made toward the universalization of secondary education in the region. Given that increases in access to education are most likely to benefit lower-income youth and that test performance is positively associated with income, greater access would be expected to have a negative effect on the results attained on educational assessments.

Keywords

The Middle East
Standardised tests
Universalization of secondary education
IMSS

Introduction

In 2015, ten countries in the Middle East and North Africa participated in the Trends in International Mathematics and Science Study (TIMSS) for 4th and 8th-grade students. When the 2015 results of the tests for the 8th grade are compared with the results of the previous cycle, five of the ten countries show a decline in science scores and three a decline in mathematics (Martin, Mullis, Foy & Hooper, 2016). This setback has caused alarm within civil society, academia, local government and even in international professional circles. In Jordan, the queen described the results as "disappointing" and called for an education system reform (The Jordan Times, 2016). Likewise, The Brookings Institute (2018), using the TIMSS results as an example, identified low educational performance as one of the major areas of opportunity on the reform agenda for Saudi Arabia. This article discusses possible mitigating factors for these concerns, in particular, the increase in the proportion of the population enrolled in secondary education in these countries and the consequences this may have had on results on standardised international learning assessments. It first presents the TIMSS application process and then the results obtained in the region. The final section offers brief conclusions.

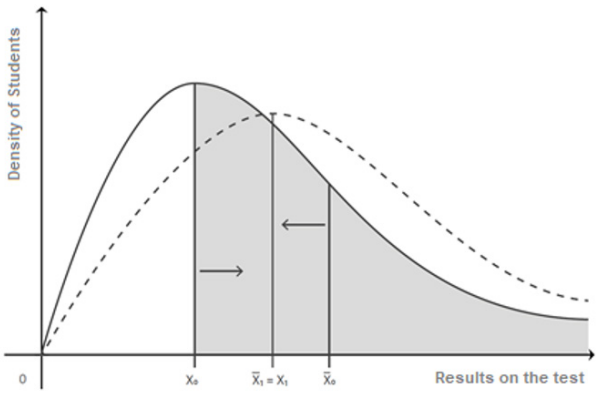
The Process of Applying Learning Assessments

The first step in implementing an international learning assessment is to conduct a sampling process of different strata groups to ensure the representativeness of the sample used during the testing process. At minimum, this sample must be representative at the country level and, in general, it should also be representative at the state or regional level. Then, the selected schools are asked to participate; most accept. While the sample is selected, the assessments are not only translated but also adapted to the specific context of each country. The sampling and assessment adaptation processes seek to ensure that differences in performance are derived

from variations in students' level of knowledge, and not from cultural differences or lack of representativeness. The specific details of the processes used for TIMSS 2015 can be found in Martin, Mullis and Hooper (2016a).

When analysing the results of developing countries, it is important to take into account that only children and adolescents enrolled in schools can be evaluated. TIMSS, for example, does not apply tests to children and young people at enrolment age for 4th or 8th grade who are not currently attending school. In countries in which secondary education is far from universal, this restriction implies that the results of standardised evaluations may not be representative of the total school-aged population, but rather only of the segment that is currently enrolled in formal schooling. Thus, the results are biased. Moreover, in countries in which school participation is not universal, household income is an important determinant of both school retention rates and performance (Glewwe & Murildharan, 2016). For these reasons, when the coverage rates in a country increase, the characteristics of the population evaluated on standardised assessments such as TIMSS are likely to change substantially.

Figure 1. Differences between the population mean and the sample mean with a biased sample of students.



Source: Author

To illustrate this possibility, let us conduct a simple theoretical exercise. Suppose we have two periods, initial (zero) and final (one), and that the expected results on a standardized test in the initial period is distributed similarly to a X^2 with three degrees of freedom (solid line in Figure 1). If all school-aged adolescents took the test, the average result would be X_0. If, however, only the students shaded in grey—those who represent the proportion of the school-aged population actually enrolled in school— take the test, the result we would observe for the top of the bell curve would be X_0. If we suppose that in the final period all students attend school and are evaluated, their performance would be that represented by the dotted line. In other words, the evaluation would yield a result of $X_1 < X_0$, which corresponds to a drop in the test results between periods zero and one. This would occur despite the "true" mean of the population having increased (that is, $X_1 > X_0$). Thus, at least in theory, an increase in the proportion of young people evaluated may imply lower results on international tests without there being an overall drop in the potential results of young people of school age. This shift would partially justify lower results on standardized skills and knowledge tests during a period of expansion of school coverage.

Results in the Middle East and North Africa

In this section, we will focus on the analysis of the TIMSS science results for eighth-grade students. In general terms, the conclusions are also valid for the TIMSS mathematics results. Of the ten countries in the region that participated in the 2015 evaluation, all obtained results below the international average of 500 points (Martin, Mullis & Hooper, 2016), ranging from 477 in the United Arab Emirates to 371 in Egypt, which had the second-lowest result worldwide, only ranking higher than South Africa. Notably, five of these countries are considered high-income countries: Saudi Arabia, Bahrain, the United Arab Emirates, Oman, and Qatar. Because the ten countries in the region that participated in 2015 had participated in previous cycles of TIMSS, the results can be compared temporally. *Table 1* presents the results from 2015 and the change in scores from the last time each country had participated in the evaluation.

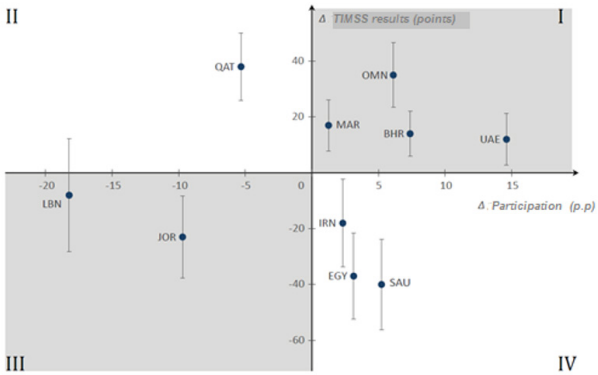
Table 1. 2015 TIMSS, Science results for 8th grade, by country

Country	TIMSS Sciences 8th grade–2015	Change since last assessment
Saudi Arabia (SAU)	396	-40
Bahrain (BHR)	466	14
United Arab Emirates (UAE)	477	12
Egypt (EGY)	371	-37
Iran (IRN)	456	-18
Jordan (JOR)	426	-23
Lebanon (LBN)	398	-8
Morocco (MOR)	393	17
Oman (OMN)	455	35
Qatar (QAT)	457	38

Source: Author's analysis with data from Martin, Mullis, Foy and Hooper (2016); The last evaluation was in 2011 for all countries except Egypt, which had not participated since 2007.

This table presents a relatively dismal picture. There were as many retrogressions as advances: a sorry state not found in any other region. However, as discussed in the previous section, the results between different applications of TIMSS may not be as comparable as they seem because of changes in the relative proportion and, concomitantly, the characteristics of the students evaluated. A simple way to represent these elements is through two axes, as illustrated in *Figure 2*. The vertical axis presents the change in the eighth-grade science results of the TIMSS test and the horizontal axis the change in the rate of participation in lower secondary school (7th to 9th grade) by country, since the year of the last assessment. Each country is a circle, and the vertical bands represent a confidence interval of 95%.

Figure 2: Changes in result in TIMSS sciences (8th grade) and partition in lower secondary education



Source: Author's analysis with data from Martin, Mullis, Foy and Hooper (2016) and UIS (2018). Participation refers to the net enrollment rate for the UAE and Morocco (MAR), gross registration fees for Lebanon (LBN), and the adjusted net enrollment rate for all other countries.

The graph allows us to identify four quadrants:

I. Increase in the participation rate and improvement in the TIMSS result: Bahrain, United Arab Emirates, Morocco and Oman.
II. Decrease in the participation rate and improvement in the TIMSS result: Qatar.
III. Decrease in the participation rate and decline in the TIMSS result: Jordan and Lebanon.
IV. Increase in the participation rate and decline in the TIMSS result: Saudi Arabia, Egypt and Iran.

An analysis that considers the changes in participation and the TIMSS result gives us more detailed conclusions: 1) Four countries in the region have managed to improve their results while also increasing the participation rate; 2) Three of the five countries in which there was a decline in results experienced increases in the participation rate, although it is unlikely that the increase in participation will fully justify the lower results; and 3) in Lebanon, one of the two remaining countries, the fall in the result in TIMSS is not statistically significant and, thus, we cannot reject the hypothesis that the difference is due to a measurement error.

The cases of Jordan and Lebanon, which show a decrease in both the participation rate and the TIMSS result, may seem contradictory to the argument that we might expect to see a decline in scores when school coverage is expanded. However, it is important to consider the effects of the Syrian-refugee crisis in these countries. Taken together, Jordan and Lebanon have received more than 600,000 refugee children and youth (UNHCR, 2018), a situation which presents additional challenges related to providing access to education for the entire school-aged population, both local and refugee. A summary of the effects of this crisis on the education system of the host countries and the praiseworthy efforts to provide education to the vulnerable population can be found in the special report prepared by the United Nations Children's Fund (UNICEF, 2018).

Conclusion

For countries in which secondary education is still in the process of universalization, different test cycles of international standardised assessments may evaluate student populations with distinct characteristics. As more young people from lower-income households stay in school longer, they are incorporated into the population included in these assessments. This change in the composition of the test sample could lead to changes in the test results, even if there were no changes in the general population of interest (all young people of school age). The decrease of results in science and mathematics in TIMSS 2015 has caused controversy and disagreement between governments and society in participating countries in the Middle East and North Africa. This article argues that there are mitigating factors that may explain this drop, at least in part. Three of the five countries in which scores decreased had also increased their school participation rates in lower secondary education, while the other two have undergone major changes in the student population and demands on their education systems due to external factors.

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Funding, Measuring, and Access: South Africa and the Global Monitoring Report on Education

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Summary

This article reflects on the post-apartheid South African state's commitment to aligning national school policies with international monitoring mechanisms such as the Global Education Monitoring Report (GEMR). It highlights provision and orientations in the South African Schools Act (1996) for example, that created a *de facto* two-tier system of schooling in South Africa after 1994. It presents how, recently, there is a further emerging spectre of public-private partnerships in schooling provision for the poor that questions South Africa's further commitment to achieving Sustainable Development Goal (SDG) 4.1.

Keywords

Global Education Monitoring Report
Funding and South African Education Policy Development
International Policy Pressures

Introduction

In her recent *Basic Education Budget Vote Speech for the 2018/19 Financial Year* (RSA, 2018), Minister of the Department of Basic Education (DBE), Angie Motshekga, demonstrated a clear commitment on the part of the South African state to uphold various global education agenda goals. She observed that:

> We have (already) matched the UNESCO Sustainable Development Goals (SDGs) into our *Action Plan to 2019: Towards the Realisation of Schooling 2030*, which is designed to achieve the long-term vision of education as encapsulated in our world-renowned Constitution and the *National Development Plan (2030), Vision 2030* (RSA, 2018).

Her view was that South Africa's articulation of education policy (for schooling) was closely aligned with global policy dimensions:

> Therefore, the Constitution, the National Development Plan (NDP), as well as the continental and international conventions, provide the moral imperative and a mandate to Government to make **access**, **redress**, **equity**, **efficiency**, **inclusivity** and **quality** educational opportunities widely available to all citizens (RSA, 2018, original emphasis).

This signals a clear message not only about the prominence of global frameworks such as the Sustainable Development Goals (SDGs) in South African education planning, but reiterates South Africa's undertaking to uphold original promises of redress, equity, and greater access to education.

In the 2017 foreword of the Minister in the Presidency: Planning, Monitoring and Evaluation in Sustainable Development Goals: Indicator Baseline Report 2017- South

Africa, a Statistics South Africa publication (2017), it had also been noted that:

> "…accelerating sustainable development to deliver on the United Nations' Agenda 2030, the Sustainable Development Goals (SDGs) must be at the centre of all our deliberations and actions (Statistics South Africa, 2017, p. 6). To illustrate this 'centrality', the foreword points out that "Since the launch of the SDGs, we now have an unprecedented opportunity to accelerate the implementation of sustainable development in South Africa" (ibid.).

This article discusses the nature of commitments to the current SDGs and explores some recent background developments that may undermine current thinking- as emerging for example within one South African province and its approach to public-private partnerships in education. It is argued that chosen funding norms for schools already raised enormous challenges after 1994 for sustainable development and peaceful co-existence in South Africa, and that current public-private developments may further hamper future progress.

Access to Quality and Free Education

The education policies of the African National Congress (ANC) since 1994 have arguably always been characterised by compromise. Why that has been so, is tied to the nature of the transition to democratic rule in the early 1990s and is not explored here (ANC, 2017). However, given centuries of colonial rule, and decades of subsequent formalisation of a racial-capitalist economy under apartheid, it is notable that the advent of the democratic order in 1994 brought with it a particular set of expectations from the landless, intentionally under-educated, employment-marginalised and politically excluded majority, which consequently led to key political promises and processes. The South African Schools Act of 1996 (SASA) for example "repealed the many racially discriminatory education laws that existed under the apartheid education system" and introduced a system of basic education that could be described as decidedly "pro-poor" (Vally, 2018, p. 43).

In pointing to the enormity of the challenges faced by the new democratically-elected government, Ahmed and Sayed (2009) observe however that funding limitations after 1994 meant that education could not be freely offered and thus many South African public schools were allowed to supplement state funding of schools by raising additional funds through school fees:

> The challenges in education were part of the broader struggle of the emerging state to transform the enormous inequalities in all sectors of South African society. In this context, the South African government pursued a particular policy path with respect to privatisation in education, with a focus on permitting public schools to charge fees (Ahmed & Sayed, 2009, p. 204).

In that regard, it is a fiscal constraint (that allowed for the charge of school fees) introduced and put in place in South Africa in the 1990s, that may undermine the ability to achieve a key goal of SDG 4.1, namely that "by 2030, (we should) ensure that all girls and boys complete free, equitable and quality primary and secondary education leading to relevant and effective learning outcomes."

Admittedly, the GEMR 2017/8 *Summary* does state that "the major contributors to education financing (should be) governmental, donors and households" and that while "current education funding levels are inadequate, perspectives differ on who should pay more" (UNESCO, 2017, p. 50). However, at the core issue of fulfilling SDG 4.1., lies the South African state's level of investment in education. Its seeming reliance on private funding (through school fee charges) since 1994 suggests an already limited commitment. In that regard, Amsterdam (2006) notes that because economic policy choices made after 1994 were primarily centred on a growth-model, a key consequence has been that the best intentions of the Basic Education Ministry would always be subject to the juggling of a number of difficult priorities.

This challenge is marked, quite candidly, in the above-noted Education Budget Vote Speech (RSA, 2018) where the Minister of Basic Education recognises that:

> In line with the UNESCO Sustainable Development Goals, we are paying more attention than ever to the equality of service delivery. There are still vast unevennesses, but we should not ignore the gains we have made.

For the South African state, the challenge was always how *delivery of education services* is deemed to be best achieved with the funds that are made available. In that regard, starting with the National Norms and Standards for School Funding (NNSSF) policy in 1998, the state developed a statutory basis to redistribute funding resources by classifying schools according to wealth quintiles and subsidising them accordingly. The underlying idea was to provide larger norms and standards allocation to schools where learners were poor and struggling, and to compensate affected schools that lacked other forms of income. This was regarded as a pro-poor policy where *Section 34 of the SASA of 1996* determined that public schools funded from public revenue ensure the proper exercise of the rights of learners to education and redress of past inequalities in educational provision through a more equitable funding mechanism. Provision was thus made (as part of the Act) to allow local and individual School Governing Bodies (SGBs) to supplement state funding by way of school

fees and fundraising initiatives (Motala & Pampallis, 2002).

However, the problem with the above model was that it was based on a very narrow per-pupil expenditure drawn from public recurrent funds (Crouch, Gustafsson & Lavado, 2009) and completely ignored redress elements like school adequacy, management capabilities, infrastructure, different contexts of rural and urban, and barriers of home and second languages, and how to allocate schools with funds for interventions that addressed these elements. In the end, because the education budget remained very limited in the period of 1996 onwards, the pro-poor redistributive mechanism of the post-1996 period remained overly-dependent for its effective dispersal on private expenditure (fees by parents) on education. This has meant that South Africa has struggled to put in place important criteria that would allow it to achieve SDG 4.1.

More worryingly, in recent times there has been an increasing push in South Africa to find alternative ways of funding to support struggling public schools. In that respect, as Spreen and Kamat (2018, p. 106) note: "privatization (has reached) a new and dangerous phase, particularly in emerging economies of Africa, Asia and Latin America". Thus, much like the charter schools in the United States and the academy schools in the United Kingdom, there is a growing belief in South Africa that the private sector can help provide quality education and increase educational opportunities for disadvantaged groups (Klees, 2017).

Moschetti (2018, p. 85), citing Robertson and Verger (2012), observes that the promotion of this idea is particularly evident in the rise of new and different forms of public-private partnerships such as charter schools, vouchers, and supply-side subsidies for private schools internationally. That is because, according to Verger, Zancajo & Fontdevila (2018, p. 16), situations and contexts of vulnerability become for many international actors "privileged moments and spaces to promote preferred policy reform approaches and to experiment with innovative policy solutions."

It is worth standing out in this regard that in South Africa the Western Cape Province (one of nine provinces) has just passed the 2018 *Western Cape Provincial School Education Amendment Bill*, which, *inter alia*, seeks to formalise a South African version of the charter school and academy school models, called collaboration schools. Arguably, the 2018 Bill is not a particularly radical departure from the precepts of the SASA of 1996, with its genesis within the two keyframing devices contained within the *SASA of 1996*, namely legislated independent (private) schools and providing for schools with wealthy parent communities to supplement state funding. As such, the under-funding of the majority of South African public schools since 1996 has created a set of underperforming schools that have become prime targets for private sector intervention, and the increasing role of private capital in the governance of public schools.
Education Member of the Education Committee in the Western Cape, Deborah Schäfer, has highlighted that while inequality remains a barrier in South Africa despite the pro-poor funding of schools, the answer to the problem in the province was no longer just about money. She claims that collaboration schools in the province will "undo patterns of inequality tied to children that are less able to learn, teachers that are less able or willing to teach, and school leadership that is often weak and contested" (Kahla, 2018). The new model, according to Schäfer, will "create opportunities for those in need and will assist the Western Cape department in the face of diminishing budgets and staffing. It will lead to better management and governance at schools and will enable the use of additional resources" (Kahla, 2018). Such new positionings pose ominous challenges to the achievement of key sustainable development goals in South Africa as a whole.

Conclusion

Recent shifts to partner with the private sector in provinces like the Western Cape, is argued, signals the further undermining of public schools in South Africa to achieve SDG 4.1. and conform to key GEMR agendas, or situate schooling and education as an important public good and a matter of justice and human rights (Vally, 2018; Verger, Novelli & Antinyelken, 2018).

While South African basic education since 1994 has been firmly framed within global education policy frameworks such as UNESCO's SDGs and the GEM Report, it has however struggled to meet or account for many of its social justice goals amidst an ever-increasing global assault on the education of the poor. As such, the articulation of the demands of the still-marginalised majority who do not have family wealth to propel them into prosperity remains firmly muted.

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