



Learning from elsewhere: A hundred years of policy learning revisited

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Abstract This article discusses four significant changes in lesson drawing, policy learning, or policy borrowing. *Thematically*, the issue of educational expansion has preoccupied policy-makers worldwide for the past hundred years. They have been eager to learn from experiences elsewhere, initially how others decentralized the finance and management of schooling to enable universal access and later how they addressed the fallout of decentralization reforms, notably inequity and quality erosion. Regarding the *modalities* of policy learning, the ‘travelling observer’ has been replaced by myriad digital platforms that propagate best practices and ‘actionable’ policy recommendations. As a consequence of the decentralization of governance and finance and, in some countries, structural adjustment policies, the *drivers* of policy borrowing have shifted from ministries of education to a wide range of stakeholders, including ministries of finance, offices of presidents and prime ministers, and private foundations and businesses. Finally, changes in the *objects of emulation* or reference societies reflect a spatial reconfiguration of a special sort. Along with countries in the same geopolitical or cultural space, the education systems of league leaders in international large-scale assessments, such as Finland, Korea, and Singapore, have become objects of policy attraction for both OECD and non-OECD countries.

Keywords Policy borrowing · Policy mobility · Policy learning · Global governance in education

Lesson drawing, peer exchange, and international cooperation are inscribed in the mission of many UNESCO institutions, including the International Bureau of Education (IBE). Analogously, policy borrowing, policy mobility, and policy transfer are objects of great academic curiosity in comparative education research. The centennial of IBE is an

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opportune moment to bring the two fields—applied policy transfer and the study of policy transfer—into a conversation with each other. This retrospective analysis brings to light the changes in (i) thematic priorities, (ii) modalities, (iii) drivers, and (iv) objects of emulation that occurred over the past 100 years. (References to the sources may be retrieved from Steiner-Khamsi, 2025.)

Educational expansion: A policy and planning challenge of *longue durée*

For a long time, policy-makers and planners were eager to learn how different countries managed and financed the ever-increasing demand for education.

Educational attainment worldwide nearly doubled during the last four decades of the previous century. From 1960 to 2000, the average years of schooling increased by over 70 per cent. In 1960, youth and adults aged 15 and older completed an average of 3.7 years of school, while in 2000, this same age group completed 6.3 years. There are significant regional differences due to colonial legacies. Western economies, or countries in the Global North, had over 60 per cent of their population enrolled in primary school by the mid-nineteenth century and more than 90 per cent by 1910. In stark contrast, colonized nations in sub-Saharan Africa had less than 5 per cent of their population enrolled in primary education in the early twentieth century. These vast disparities across world regions affect all levels of education.

All countries have experienced both horizontal and vertical educational expansion. Vertically, an increase in enrolment at one level leads to a rise in enrolment at the next level after a few years, transforming educational expansion into a *longue durée* phenomenon. It is important to remember that the expansion of primary education primarily happened in the nineteenth and twentieth centuries, while the demand for secondary education began much later. In Western economies or Global North countries, the expansion of secondary schools accelerated in the 1950s, resulting in explosive growth in higher education 20 years later, in the 1970s. In some countries, discussions about ‘overeducation’ arise due to many university graduates encountering difficulties in securing employment. Again, regional variations are significant. Educational expansion in terms of educational attainment and the average length of schooling presents only half the picture. The other half pertains to vertical expansion: an ever-growing number of individuals enrol in school. Liberal beliefs in human rights, which include the rights of women, marginalized groups, minorities, and children with special needs, contributed to the demand for schooling. Since the nineteenth century, vertical expansion has followed a self-reinforcing pattern: the spread of the belief in the universal right to education has fostered a demand for education, and conversely, the more educated individuals (especially mothers) became, the more they advocated for the right to education.

As expected, the increase in enrolment led to a significant rise in the education budget. Public spending on education soared by 500 per cent from 1960 to 2000. Not only did governments commit to improving access to education, enabling more individuals to enrol in educational institutions, but the costs per student for essential support services and school infrastructure also increased. Public expenditure and taxation in developed economies tended to grow faster than income as a share of gross domestic product (GDP). The relative growth of the public sector, measured by the change in public expenditure as a percentage of GDP, was notable and peaked at 44 per cent by the mid-1990s. Countries

faced difficulties keeping up with high levels of public spending amid significant budget deficits. There is consensus that funding and managing educational expansion presented substantial challenges for governments worldwide.

As explained in more detail in another publication (Steiner-Khamsi, 2025), governments implemented various strategies to meet the rising demand for education. The three most common approaches included: decentralizing the management and financing of compulsory education; providing generous funding to select provinces, counties, or schools, with the hope that their exemplary high-quality education would benefit the other public schools; and increasing revenue for the sector by charging tuition or collecting other types of fees from parents. Alternatively, we can refer to the three reforms as ‘Eating from separate pots’ (decentralization of finance and management), ‘Funding a few at the expense of the masses’ (establishment of centres of excellence), and ‘Cost-sharing with parents’ (low-fee schools, which have led to a rise in business interests in education).

A fourth strategy—reducing public expenditures by enhancing efficiency and maximizing cost-effectiveness in public institutions—was initially proposed by economists in business administration and later developed into a comprehensive doctrine known as New Public Management. This fourth strategy resulted in a broad reform package, which Antoni Verger refers to as ‘school autonomy with accountability’ (SAWA). As empirically demonstrated by Patricia Bromley (Stanford University) and Rie Kijima (University of Toronto), the pinnacle of the neoliberal SAWA reform occurred between 1992 and 2008 (see Steiner-Khamsi et al., 2025).

When viewed chronologically, the policy responses to the rapid expansion of education led to two subsequent problems: inequality and a decline in quality. Depending on their political affiliations, governments prioritized one of these two policy challenges over the other. The decentralization of finance and management (strategy 1), the establishment of centres of excellence (strategy 2), the implementation of tuition fees (strategy 3), and the introduction of choice and vouchers (strategy 4) most significantly affected children and youth from low-income households and rural areas. Inequality based on location and family income resulted in drop-out rates and non-enrolment. It also contributed to the less-frequently discussed phenomenon of education-driven urbanization. The UN Department of Economic and Social Affairs (DESA) projects that 68 per cent of the world’s population will live in cities by 2050.

Quality erosion was equally challenging due to the shortage of teachers, inadequate school facilities, and a lack of textbooks. To address the high demand for education, governments resorted to hiring underqualified contract teachers, implemented two or three shifts, introduced textbook rental schemes, and adopted various transitional measures. The decline in quality was worsened by for-profit private providers which reduced costs to boost their profits. Choice and voucher schemes transformed the education sector into a profitable industry. In the early-adopter countries of SAWA, the adverse effects of the market-driven reforms from the 1990s became evident. Around the turn of the millennium, social democrats (led by British Prime Minister Tony Blair and Chancellor Gerhard Schröder in Germany, and supported by President Bill Clinton, in the United States of America) embraced a ‘Third Way’ in public administration. They agreed to reduce the large state apparatus that wealthy countries established during the welfare state era while promoting public–private partnerships. Outsourcing the delivery of public goods and services became the standard practice. To maintain quality in service provision, successive governments established quality standards and held private *and* public providers accountable for their deliverables and outcomes.

The role of the state in regulating the education sector changed dramatically. Henceforth, governments regulated the public sector through quality assurance and accreditation. Governance by numbers means having standards in place and measuring the achievement of those standards. Translated into the education sector, this meant standardizing the curriculum and introducing standardized tests. The proliferation of standardized tests in an ever-growing number of grades and subjects became unstoppable.

In retrospect, it is clear that the three thematic priorities for school reform are interconnected and should be understood in their temporal order. The commitment to improve access to education has led to an unprecedented and rapid expansion of schooling, both horizontally and vertically, creating challenges related to inequality and a decline in quality. At the same time, enhancing access to education remains an ongoing struggle. The 1994 Salamanca Agreement on special needs education and other international agreements helped establish moral standards for horizontal expansion. Similarly, the rise of knowledge economies has reframed education as a form of human capital essential for economic, social, and political development. The Organisation for Economic Co-operation and Development (OECD), in its 2030 Learning Compass, an evolving framework for the future of education, outlined the necessary resources for future well-being and prosperity while also emphasizing ecological sustainability.

From travelling to downloading

The modalities of lesson drawing and policy borrowing also experienced fascinating shifts.

The travelling observer existed long before comparative education was established as a science. Comparativist Gail P. Kelly refers to the early days of comparative education as the period ‘when gentlemen traveled extensively and wrote about the differences between nations’. In addition to these travelling observers, a few local analysts systematically compared their systems to the education systems of other countries. In 1808, French professor César-Auguste Basset urged his university to send a researcher to ‘foreign countries’ to ‘observe, compare, and present the facts’ regarding their educational systems and methods of instruction. Periodically, features of other school systems were showcased and presented during world exhibitions. While policy pilgrimages persist (e.g., to Finland, Singapore, or Shanghai), alternative methods of policy learning and peer exchange have emerged over the past century.

In the twentieth century, reports on educational development were published in education yearbooks. The first yearbook, *The Educational Yearbook* (1924–1944), was issued by the International Institute of Teachers College at Columbia University in New York under the editorship of Isaac L. Kandel. The Institute of Education in London began its *Yearbook of Education* series in 1932. A year later, the IBE launched its annual series, *International Yearbook of Education* (1933–1969, except for 1940 to 1945). Scholars and policy analysts used the information in the yearbooks for lesson drawing and comparison, even though the brief reports were not comparative. They primarily consisted of short reports on significant developments in educational systems worldwide. While they occasionally referenced enrolment data, overall educational statistics were of secondary importance.

This changed dramatically once economists entered the field, rendering education systems measurable and comparable. The World Bank began using indicators to monitor national developments in the late 1980s. Its databank grew from 116 indicators covering all

sectors in 1989 to 2,500 indicators in 2024 for education alone. Three years later, in 1992, the OECD launched the data-driven annual series *Education at a Glance*, while UNESCO began publishing the *Global Education Monitoring Report* in 2002.

In the 1990s, evidence-based, or rather data-driven, policy, planning, and practice became a desideratum. At the national level, this shift was prompted by the liberalization of providers, which encouraged non-state entities to operate schools. Consequently, a new tool of governance emerged: performance measurement or outcome regulation. Typically, governments have four instruments at their disposal: legislation, funding, persuasion, and contracting. The fifth tool surfaced during the era of network governance, when businesses and private foundations were invited to participate as providers and/or policy advisers to the government. Data and research evidence were hyped as the neutral device that would turn input (taxpayers' money) into scientifically approved impact assessment. UNESCO's Monitoring Learning Outcomes, the OECD's Programme for International Student Assessment (PISA), the International Association for the Evaluation of Educational Achievement (IEA)'s Trends in International Mathematics and Science Study (TIMSS), and many other regional and international large-scale assessments, were highly sought after during this period.

The recent emphasis on data and evidence has led to a constant flow of indicators, studies, case studies, and compilations of 'good' or even 'best' practices. Open access to information, facilitated by the internet, has proven to be both a blessing and a curse. What to do with the surplus of information, data, and research evidence? UNESCO's 2024 Strategic Review, titled *Improving the Use of Evidence for Education Policy, Planning, and Implementation* (UNESCO, 2024), conducted a worldwide survey in the UN languages. The report's authors (Steiner-Khamisi and Faul, with Baek, Iwabuchi, and Numa Hopkins) administered a worldwide survey (898 persons residing in 103 countries responded) and also interviewed representatives from organizations that either produce or utilize data and research evidence in the education sector. The UNESCO study highlights disparities by region, by the Sustainable Development Goals (more studies are available on SDG 4.1 and SDG 4.5, compared to all other targets of SDG 4), and between the production and utilization of studies. While all knowledge products are readily accessible through digital platforms, policy-makers in many parts of the world seldom use them.

International organizations have become inventive in enhancing the utilization of research evidence for policy, planning, and practice. Pragmatically, they have started to build partnerships and networks to direct traffic to their platforms. Subsequently, they have improved communication regarding research evidence by making it 'actionable' through policy briefs, research summaries, and various communication channels, including webinars, podcasts, and videos. In recent years, international organizations such as UNESCO and the Global Partnership for Education (GPE) have revitalized or established regional cooperation and peer exchanges. Much like knowledge brokers that connect science and politics, the regional hubs of the GPE-funded Knowledge and Innovation Exchange (KIX) initiative actively promote the use of research evidence in policy, planning, and practice. However, all these efforts will remain ineffective unless knowledge inequity is addressed and experts from GPE partner countries are recognized as knowledge producers. It is a misconception to assume that policy advice and studies generated by experts in the Global North possess universal validity and will be applicable to governments in Global South countries.

Universities are conspicuously absent from international efforts to promote the use of research evidence. Let us not forget that supply drives demand. The professionalization

of policy studies in education through professional associations, degree or certificate programmes, and journals has a salutary effect on evidence-based policy decisions. These professionals will likely lobby for the greater use of research evidence in their own country.

The gradual move to polycentric and multi-stakeholder governance in education

We have become accustomed to reading about new global actors, notably the rise of new donors (such as China) as a result of a multipolar world order. At the national level, governance is also polycentric. Even though ministries of education coordinate and implement reforms, they are not always the architects or drivers of reform. Three examples should suffice here.

First, the current global trend of introducing bilingual public schools with English as the language of instruction is often driven by the offices of presidents or prime ministers rather than by the ministries of education. These leaders direct ministries of education to ‘internationalize’ public schools by selecting a few as centres of innovation. The expectation is that innovations at these centres of excellence will benefit all public schools. Well-documented examples include the International Baccalaureate schools in Ecuador and Japan, bilingual schools in Mongolia, Nazarbayev Intellectual Schools in Kazakhstan, and International Standard Schools in Indonesia. The costs associated with these public–private partnerships have been excessive, limiting the replicability of this model across all public schools.

Second, most management and finance reforms in education are led by ministries of finance rather than ministries of education. Sequence is important here as well. For instance, New Public Management was initially adopted in ministries of finance before being applied to line ministries. Around the same time, many countries established new public procurement laws that mandated governments to outsource the delivery of public goods and services. Outsourcing and contracting private providers made it essential to define, measure, and monitor the expected outcomes. As noted, standard setting, performance measurement, and accreditation became widely used policy tools. These public-administration reforms have had significant impacts on the education sector, leading to a surge in privatization, along with an increase in standardized testing and other evaluation methods. Similarly, today’s e-government reform, participatory budgeting, and social accountability measures are primarily driven by ministers of finance.

Ministries of finance also act as binding partners for international financial institutions (such as the Asian Development Bank and the World Bank), creating various challenges for ministries of education. Due to decentralization reforms, ministries of education in countries that receive loans and grants have lost both personnel and authority compared to provincial or municipal administrative bodies. Nevertheless, they are required to report to their ministries of finance, which in turn report to the World Bank on the progress made toward the targets established in loan or grant agreements.

Ministries of education have always served as the executive bodies within a broader governance structure. However, their authority dwindled due to the transfer of decision-making from the central or federal level to the subnational level. The rapid turnover of administrative personnel highlights the political vulnerability of high-ranking government officials in the education sector.

Finally, many countries have seen the rise of the private sector or private foundations as backstage ministry advisers. In some countries, they exceed the role of unofficial advisers who impact policy decisions through grant funding and commissioned research. There has been a move towards multi-stakeholder representation at the national and international levels, allowing, or even encouraging, the private sector and philanthropies to be actively and officially involved in the policy process.

Spatial reconfigurations: New education spaces, new reference societies

Finally, the reference societies or countries used for emulation and lesson drawing have experienced a remarkable transformation over the past 100 years. For a long time, wealthy countries were primarily interested to learn about the educational development of other wealthy nations. Peter the Great's interest in the education system of Prussia, or the nineteenth-century British fascination with Germany's educational practices are well-documented examples. Similarly well-analysed are the research initiatives of early comparativists in the early twentieth century at the Institute of Education in London and at Teachers College, Columbia University, New York, who studied educational development in former colonies and dependent states to gain insights into the 'stages of educational development'. At Teachers College, faculty members, including John Dewey, wondered whether 'educationally new' countries could learn from nations that had established compulsory education some time ago.

Today, the term 'educationally advanced countries' has been eliminated from our vocabulary due to its colonial implications. However, the league tables released after each cycle of PISA, TIMSS, and other large-scale student assessments convey a similar rationale for comparison—this time visually rather than verbally. Currently, rankings depend on standardized student assessments rather than reports written by international experts following brief study visits. Upon closer examination, it becomes clear that student performance, or learning, is just one factor influencing the selection of a reference country. Other geopolitical and cultural considerations are also vital when choosing a model country. A noteworthy example is the peer-learning initiative of the OECD's Education and Skills Directorate, as summarized by OECD experts Michael Ward and Melissa Mouthaan. The Directorate invites policy experts to identify other PISA-participating nations from which they would like to learn. Latin American countries (Ecuador, Guatemala, Honduras, Paraguay) consistently choose other Spanish or Portuguese-speaking nations, while policy analysts in African countries (such as Senegal and Zambia) and South Asian countries (like Cambodia) select a diverse array of countries for peer learning, including leaders in international large-scale assessments such as Finland, Korea, and Singapore.

International organizations have their own 'poster children' that they frequently refer to as educational systems worth emulating. Helen Seitzer, Chanwoong Baek, and I (2023) analysed 145 reports from the World Bank, particularly their SABER (Systems Approach for Better Education) series, along with 131 OECD reports (*Education Policy Outlook* and *Reviews of National Policies for Education*). The trends are significant: these two intergovernmental organizations tend to highlight either early adopters of the neoliberal SAWA reform (Australia, UK, USA) or top performers in international large-scale assessments. Specifically, the USA is the most cited country in the OECD reports, with a total of 2,057 mentions, followed by England (not Great Britain) with 906 mentions, and then Great Britain with 804 mentions. Australia (786), Germany (723) follow in frequency, ahead of PISA-winner Finland (713). The most cited countries in the World Bank reports include the USA (1,217), followed by

the much less referenced Singapore (336), Japan (247), England (238), the Republic of Korea (235), and the People's Republic of China (197).

Conclusions

This article explained in broad strokes how the practice and the scholarship of lesson drawing, policy learning, and policy transfer have evolved over the last 100 years. There have been considerable shifts towards: (i) quality and equity as thematic priorities; (ii) production *and* uptake of research evidence for policy, planning, and practice; (iii) polycentric and multi-stakeholder governance; and (iv) a bifocal interest in learning from 'best performing' education systems, as well as from countries that are in the same regional or linguistic space.

These four changes have been well studied and documented. However, three other types of lesson drawing are still in the early stages of education policy research. They need to be placed on an agenda for further investigation and are, therefore, summarized in the form of research questions: First, which aspects of public administration reforms (currently, e-government or New Public Governance) are transferred to the education sector and subsequently 'translated' or adapted to education? Second, what lessons have early adopters learned from late adopters of a global school reform, and vice versa? Finally, is there a feedback mechanism between national and global actors that prompts us to investigate what international organizations learn from governments when providing policy advice, and, conversely, when do governments rely on lesson drawing provided by international organizations?

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