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The global reform packages in education: Variations and changes over time

Gita Steiner-Khamsi

Visiting Professor at the Graduate School of International Cooperation Studies (GSICS), Kobe University

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- 1. Systems thinking and global scripts; two examples:**
 1. Rural education and development project READ (World Bank)
 2. Grant-for-schools programs (ADB)
- 2. Unpacking a global reform/script; “School-Autonomy-with-Accountability” (SAWA)**
 1. Its theory of change
 2. Its bundle(s) of policies
 3. Its policy instrument
- 3. Explanations for the diffusion and the adoption of the global reform**
 1. Worldwide development:
 1. Phase 1: The worldwide expansion of education & its financial implications
 2. Phase 2: The call for standard-setting and accountability
 3. The sequence of the reform elements
 2. National encounters with the global SAWA script
- 4. An agenda for further research**

1. Systems thinking & global scripts

- Rural education and development project READ (World Bank)
- Grant-for-schools programs (ADB)



1.1. The World Bank's **Rural Education and Development (READ)** project

Theory of change:

Generate and sustain a surplus/choice of books

Instruments of change:

- Capacity-building of teachers, parents, school librarians
- Financial incentives to develop standardized literacy tests
- Information campaigns (TV, radio)

Elements/outputs/outcomes:

- Students write own "small books"
- Parents read books with their children
- Librarians teach students how to take care of books
- Strengthen school-based project management
- Students get tested in terms of (literacy) outcomes
- Etc.





The adverse effects of datafication: loosing sight of the bigger picture/system:

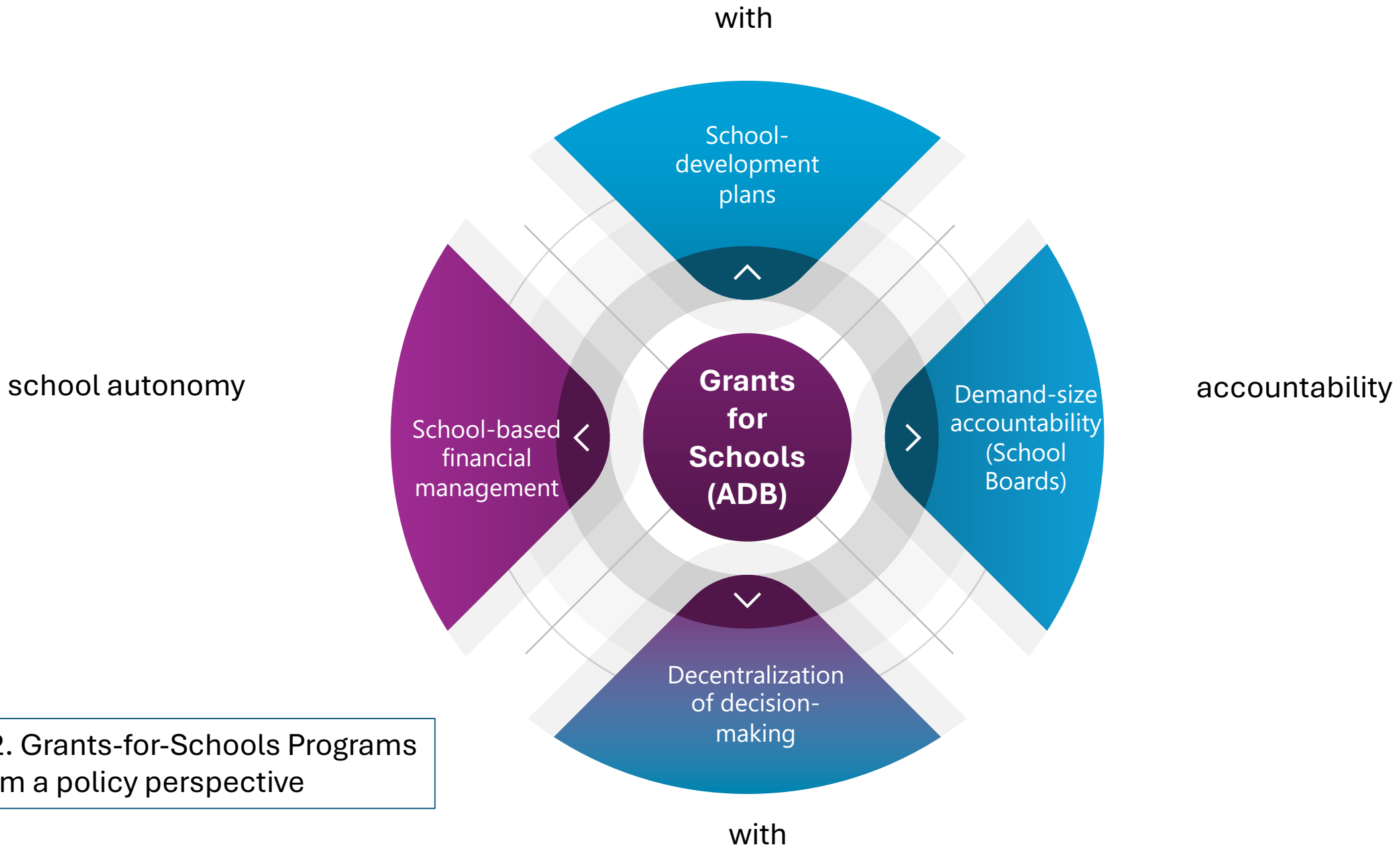
82 indicators were used to measure the outputs of the READ project (including a few outcomes)

Results Framework

PROJECT DEVELOPMENT OBJECTIVE INDICATORS

INDICATOR		BASELINE	CURRENT
	Value	0.00	4549.00
The number of teachers, librarians, school directors and ECD primary methodologists in rural bagh and soum schools who have participated in project professional development activities	Date	Invalid date	January 15, 2017
	Comment	The baseline is 0 because the indicator is measuring the increase.	Data from the baseline survey as to the number of educational professionals who participated in project professional development activities
	Value	0.00	130000.00
Number of students in grades 1-5 in rural bagh and soum schools who have access to learning materials and improved teaching practices	Date	Invalid date	January 15, 2017
	Comment	The baseline is 0 because the indicator is measuring the increase.	Data from the baseline survey as to the number of beneficiaries
	Value	0.00	200.00

Source:
<https://projects.worldbank.org/en/projects-operations/project-detail/P096328>



1.2. Grants-for-Schools Programs from a policy perspective

2. Unpacking a reform



The theory of change of the global script “SAWA”

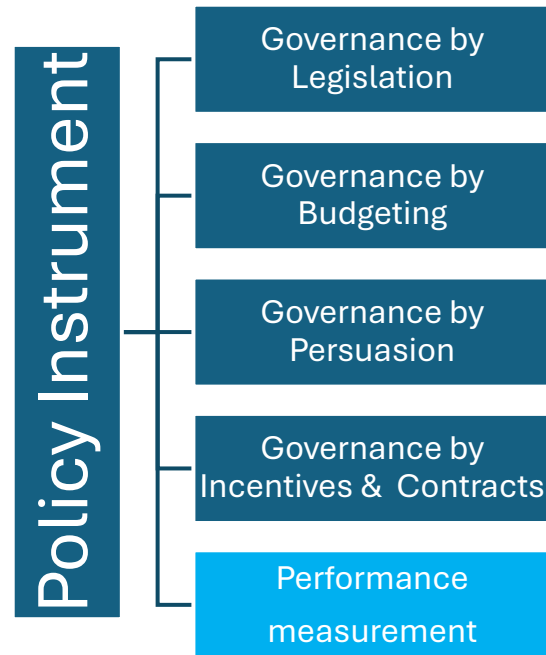


Source for the term "SAWA" = Verger, Parcerisa, Fontdevila, 2019

SAWA's bundle of policies

		A	P	R	S
1	The bundle of school autonomy policies				
1.1	Professionalization of school management				
1.2	Introduction of per capita financing				
1.3	Incentives for non-state actors to run schools				
1.4	Development of school study plans & electives				
1.5	Establishment of school boards for oversight				
1.6	School choice				
2.	The bundle of accountability policies				
2.1	National curriculum guide				
2.2	Standardized tests at key stages				
2.3	Publicize test results				
2.4	Remedial measures for failing schools				
2.5	External evaluation				
2.6	Performance-based pay				

Policy instruments in general



Adapted from Hood (1984) & complemented with LeGalès (2016)



3. Explanations

- Worldwide developments:
Evolution of the global SAWA script
- National encounters
with the global SAWA script

3.1. Explaining the worldwide move towards SAWA (consideration of the **time period**)

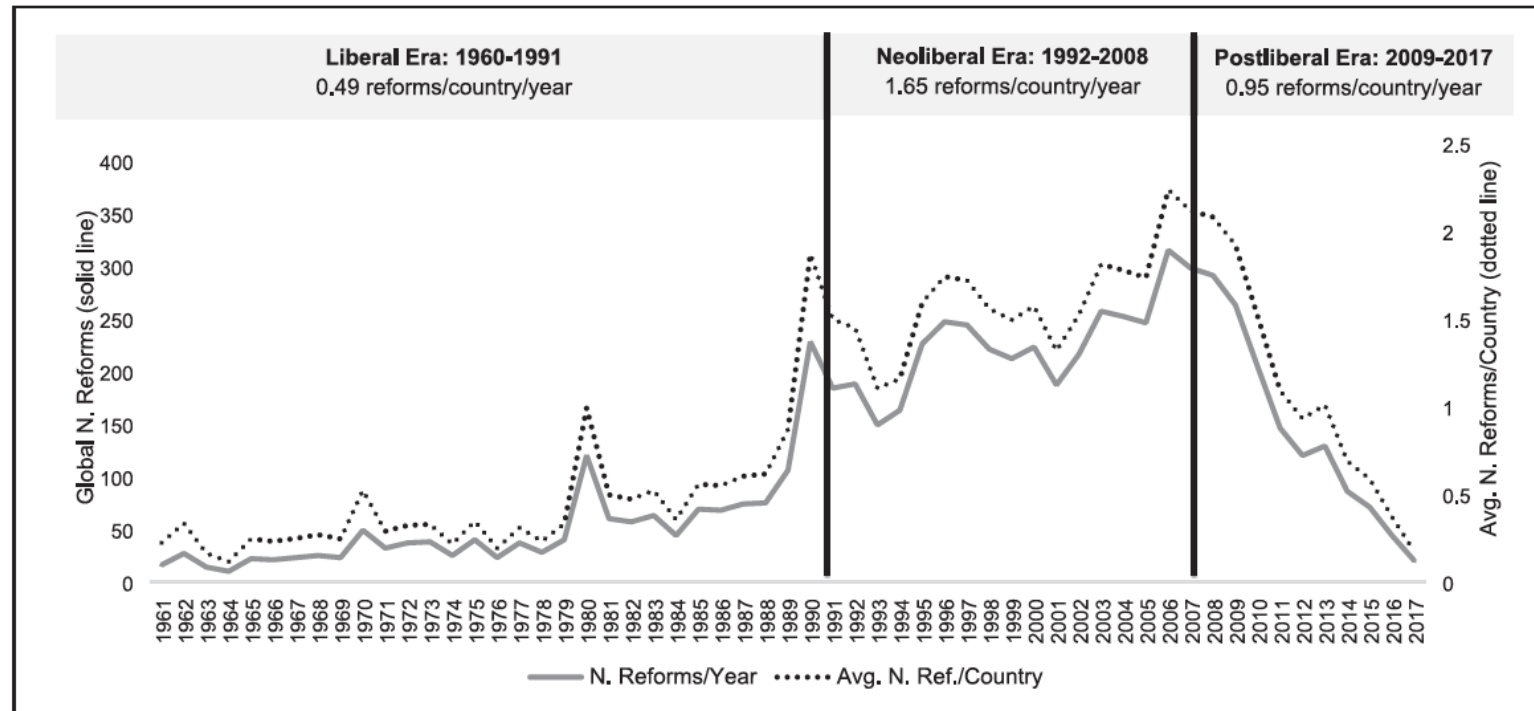
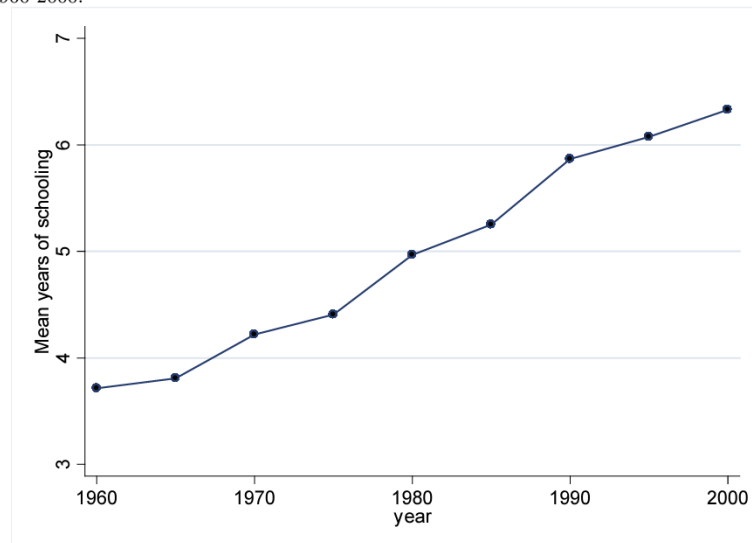


Figure 2. Number of reforms over time (n reforms = 6,700; n countries = 147).

Source: Bromley, Furuta, Kijima, Overbey, Choi, Santos (2023: 158) in *Sociology of Education*
Database: World Education Reform Database ([WERD](#))

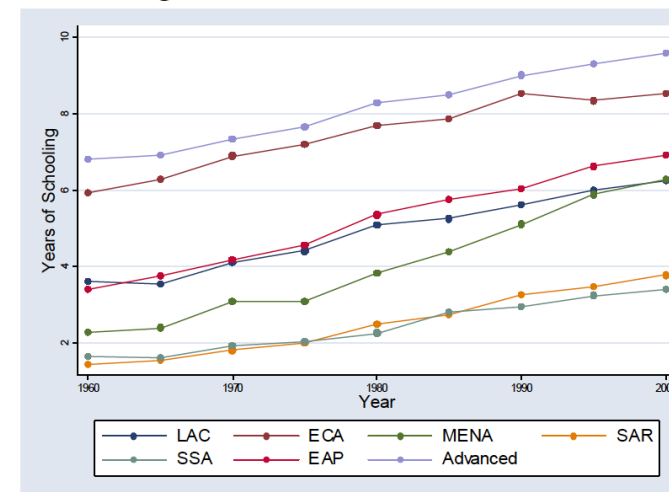
Phase 1: The worldwide expansion of education ... and its financial implications

FIG. 1. Average number of years of schooling for population of 15+ year-olds, 1960-2000.



Source: Gradstein, Nikitin & Zou, 2023

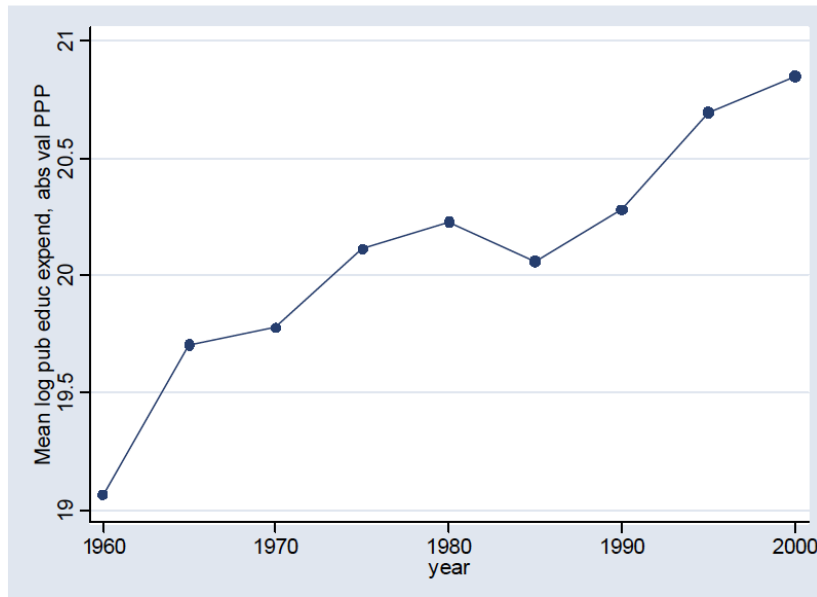
Figure 1b: Average number of years of schooling for population of 15+ year-olds, 1960–2000, by the world regions



Source: Gradstein & Nikitin, 2004

The need for financial decentralization (PR China: “eating from a separate pot”)

Figure 3a: The Evolution of Public Spending on Education, 1960–1999



Source: Gradstein & Nikitin, 2004

Example: “Eating from a separate pot” --

PR China 9-year compulsory basic education law.

**Phase 1: The need to decentralize finance;
rise of public spending for education**

1967: 2.0% of the GDP

1985: 7.7% of the GDP

“As a result, by the early 1990s, financing of primary and secondary education came almost exclusively from regional and, especially, local (county) sources” (Gradstein et al., 2023, p. 225)



Reality

Educational expansion

Cost explosion

Devolution of finance and decision-making
from the central to the provincial to the local
level



Rhetoric

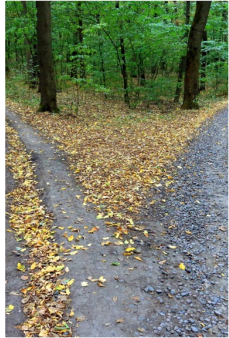
“Local authorities and schools know better”

"Breaking the state monopoly on education"

Milton Friedman’s suggestion: Reduce cost by
incentivizing competition among schools and
by promoting choice

Phase 2: The call for standard-setting and accountability

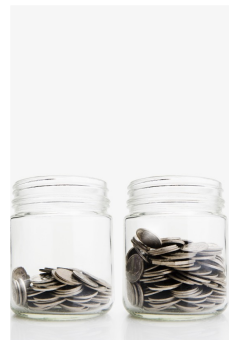
(recentralization or the re-awakening of the Interventionist State)



Regional Inequality: Example PR China, the variation in education spending across the administrative regions was by 1989 between 40-50 % and strongly correlated with the regional income per capita (Gradstein et al., 2023).



Concerns with the quality of education: Examples UK (“failing schools”), US (“remedial measures”) and calls of democratic/Labour governments to establish and monitor standards.



The boom of for-profit private schools and “the killer graph” in Sweden showing the sharp decline in the 2009 PISA results (Grek, 2020, p. 190).

3.2. Sequence: First access (educational expansion), then quality

Overbey (2023:98), in *Annual Review of Comparative and International Education 2022*

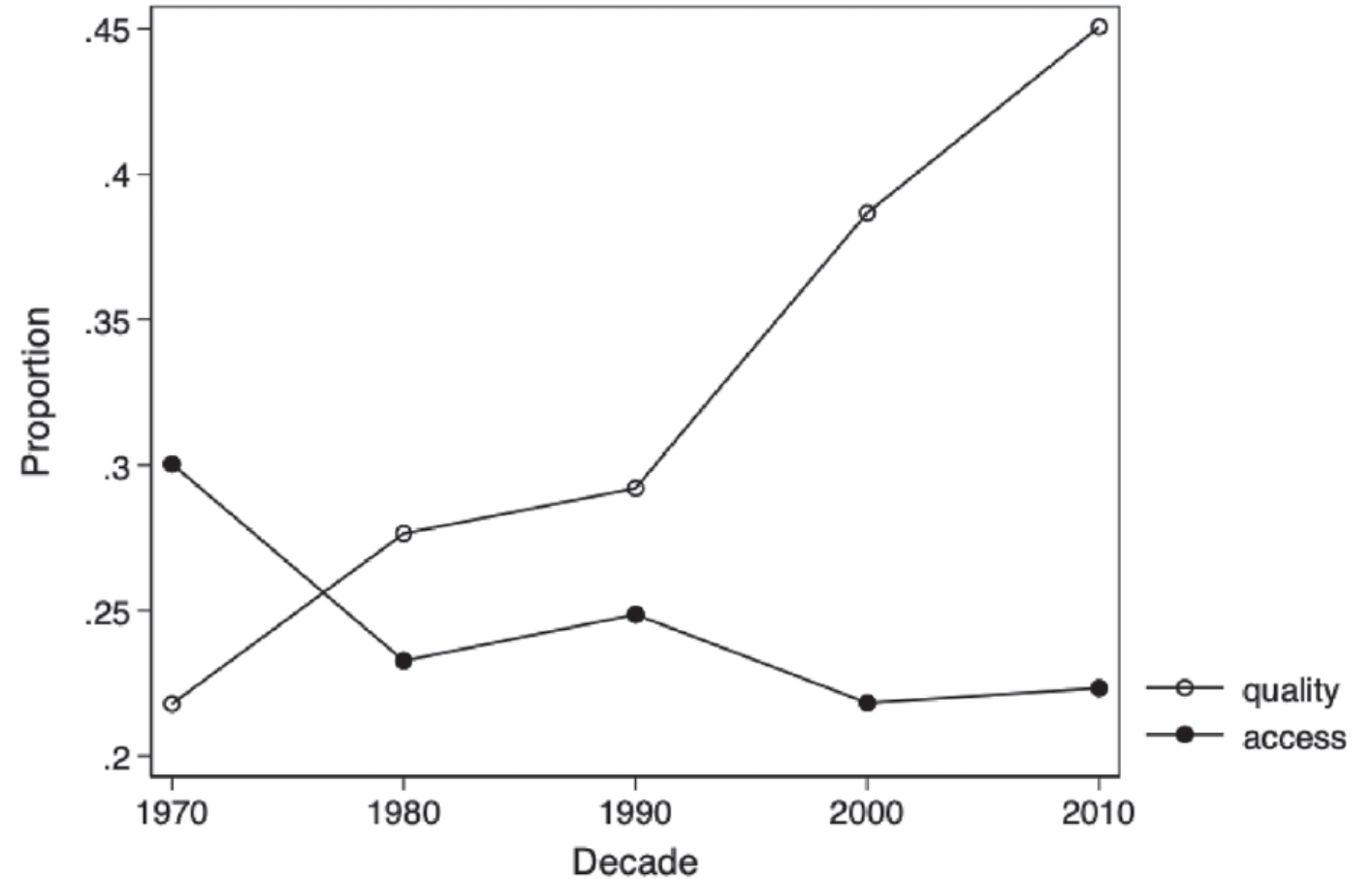


Fig. 6.1. Trend by Decade in the Proportion of Access and Quality Reforms Adopted, 1970–2018.

3.2. (Tentative) sequence of reform priorities and policy challenges: 1960 - 2024

1960s

Reform priority: access (1960 - ongoing, today: refugees)
Challenge: rapid educational expansion & cost explosion

1980s

Reform priority: decentralization, school autonomy
Challenge: managing and financing schools

2000s

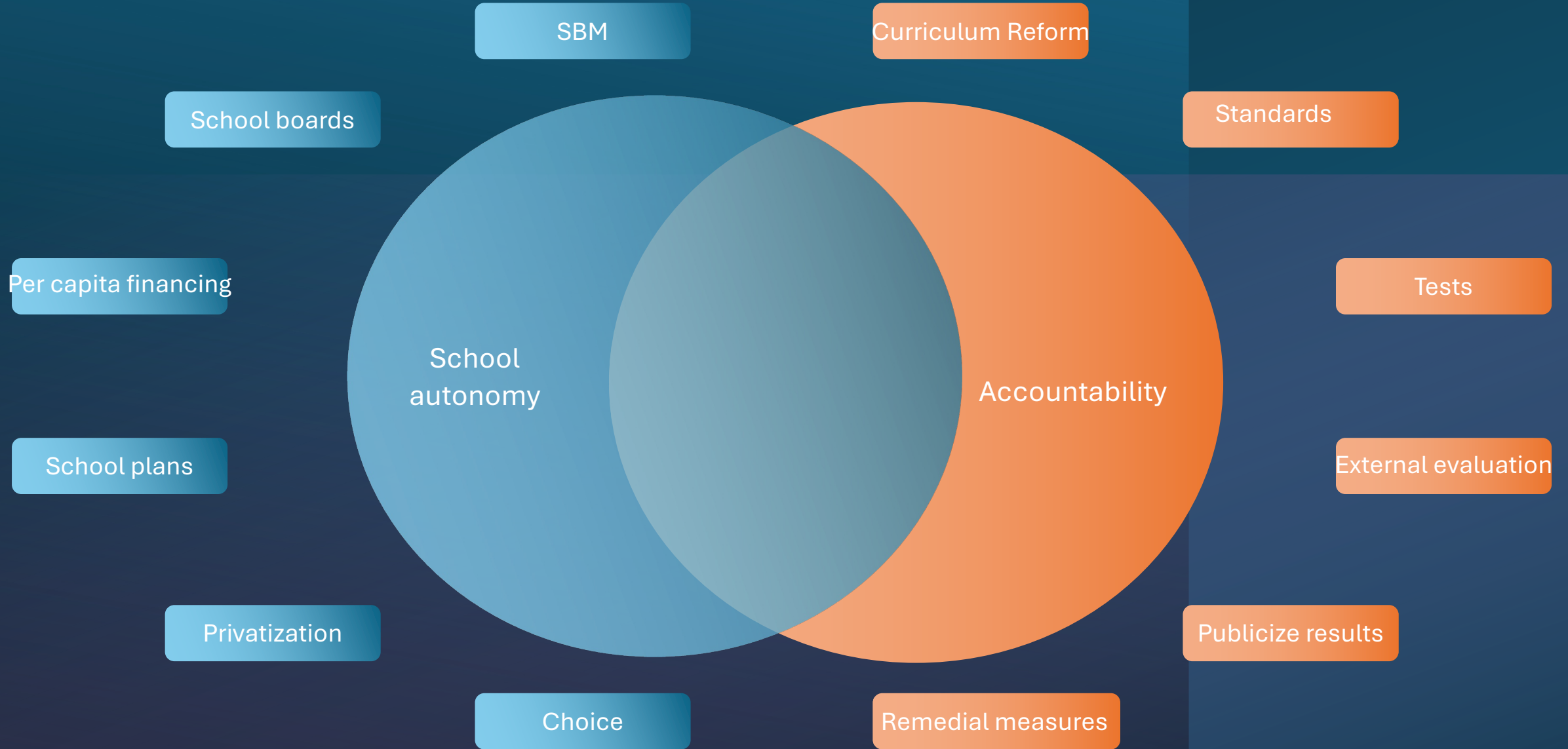
Reform priority: accountability
Challenge: inequality, quality, learning

2010s
?

Reform priority: testing?
Challenge: standardized curriculum, datafication, technology

The neoliberal state

The interventionist state



SBM

Curriculum Reform

School boards

Standards

Per capita financing

Tests

School
autonomy

Accountability

School plans

External evaluation

Privatization

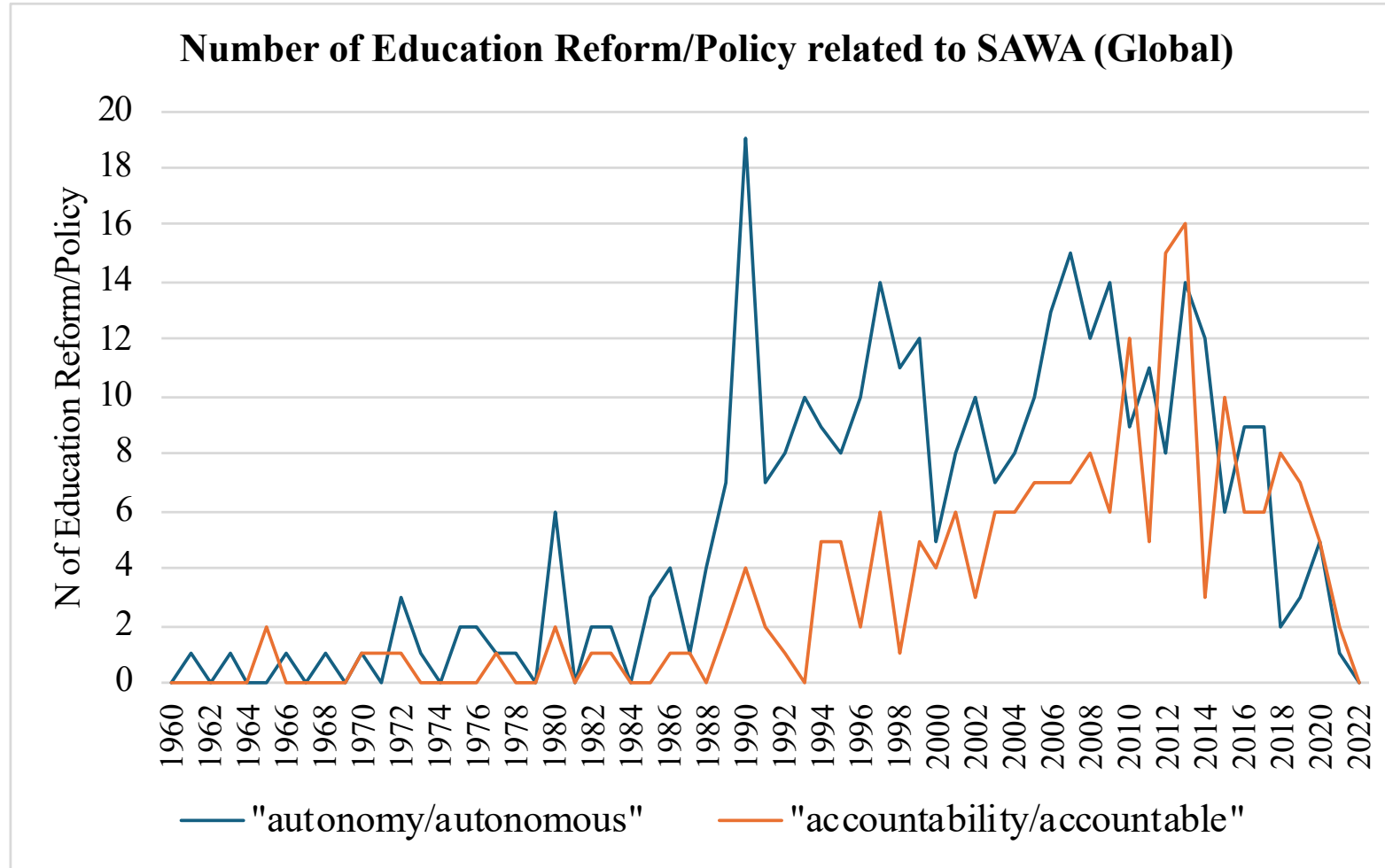
Publicize results

Choice

Remedial measures

The two phases of the SAWA reform

Source: Ayumu Yagi, Kohei Uno, 2024 (GSICS, Kobe) based on WERD

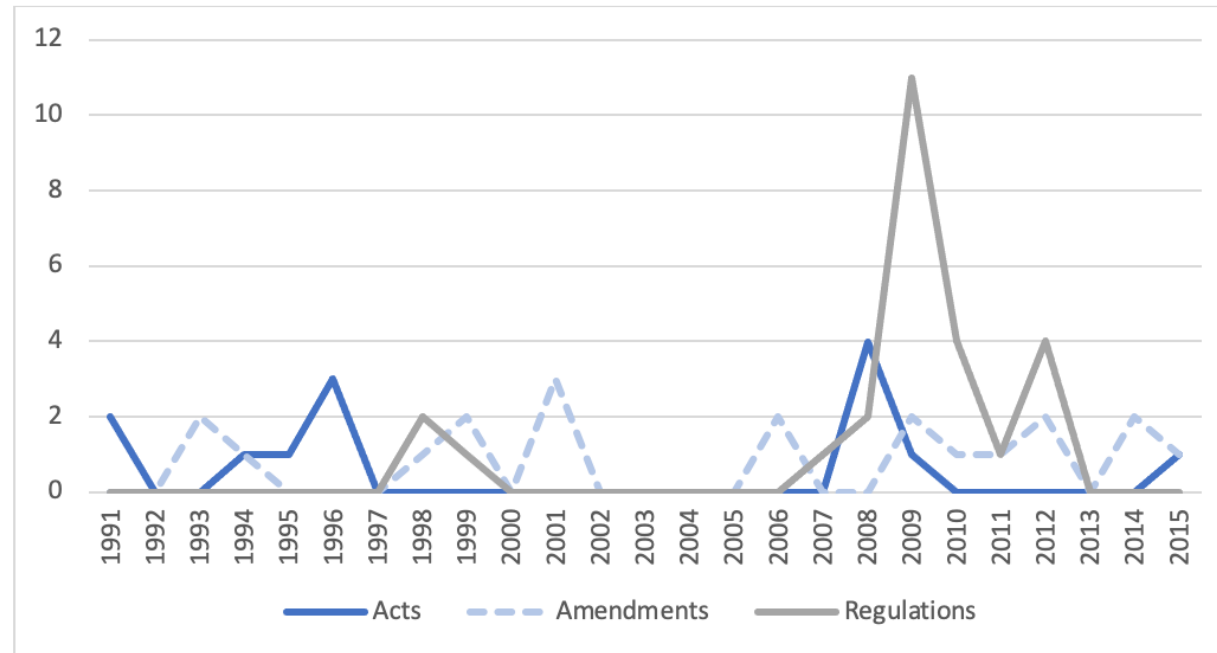


Source: Ayumu Yagi & Kohei Uno, GSICS, Kobe University, 2024, using data from WERD

3.3 Timing of adoption, countries' receptiveness for "traveling reforms"

3.3. Country-specific **timing** of SAWA receptiveness

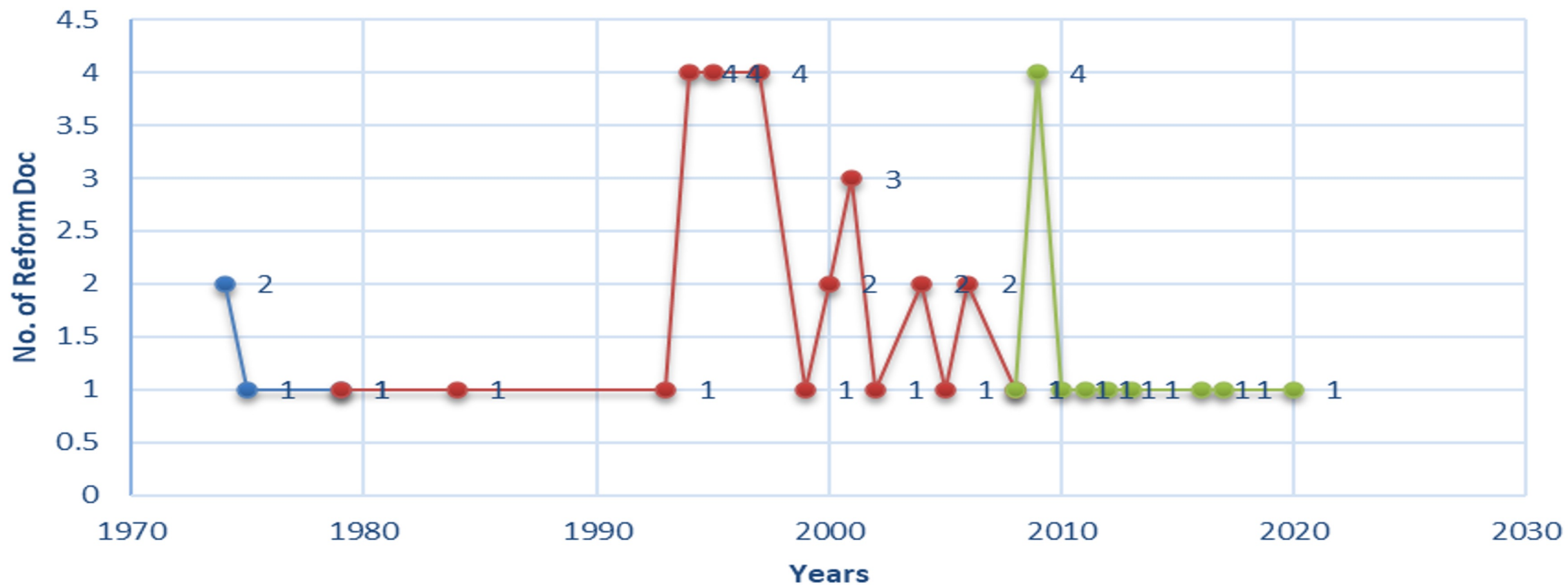
Figure 1. Frequency of policy decisions in the education sector of Iceland, 1991–2015



Sources: Althingi.is and Reglugerd.is

Note: Change in government in 2008, economic crisis in 2008
Source: Steiner-Khamsi, Jóhannesdóttir, Magnúsdóttir, 2024

Number of Reforms in Ethiopia between 1970-2020



Note: New government in 1994, economic crisis in 2008

Source: Million Bekele, Hoeun Sreymech, Bai Yuhang, GSICS, Kobe U, 2024
Using data from [World Education Reform Database \(stanford.edu\)](https://worldeducationreform.stanford.edu/)

Reform frequency by year in Bangladesh, 1970 - 2020

Year	Documents
1970	0
1971	1
1972	2
1973	3
1974	1
1975	1
1976	2
1977	2
1978	2

Year	Documents
1979	1
1980	1
1981	2
1982	1
1983	2
1984	0
1985	2
1986	0
1987	1

Year	Documents
1988	1
1989	1
1990	16
1991	2
1992	6
1993	3
1994	0
1995	3
1996	1

Year	Documents
1997	2
1998	1
1999	0
2000	1
2001	1
2002	3
2003	2
2004	3
2005	4

Year	Documents
2006	2
2007	1
2008	2
2009	2
2010	5
2011	6
2012	1
2013	1
2014	1

Year	Documents
2015	2
2016	3
2017	1
2018	3
2019	0
2020	2

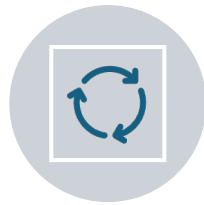
Source:
Munib K. Afridi,
Rakibul Hassan,
Kyoko Okamoto,
GSICS, Kobe U,
2024, WERD data

What gets adopted versus what “sticks”: The temporal dimension of policy transfer

Selective adoption of a script



TIME PERIOD



SEQUENCE



TIMING

Institutionalization of policies

- Tempo
- Lifespan
- Age