Global Education Policy and International Development: An Introductory Framework

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About this book

Today, as we speak, similar education reforms and a common set of education policy jargon are being applied in many parts of the world, in locations that are incredibly diverse both culturally and in terms of economic development. Education policies and programmes such as child-centred pedagogies, school-based management, teachers' accountability, public-private partnerships or conditional-cash transfer schemes are being discussed and implemented everywhere, to the point that they have acquired the status of 'global education polices' (GEP). More and more researchers, coming from different disciplines and sub-disciplines such as comparative education, political sociology, anthropology and political sciences, are paying attention to the GEP phenomenon. Traditionally, scholars have used very diverse terms to refer to this phenomenon, such as policy diffusion, policy borrowing, policy transfer, policy travelling, isomorphism or convergence, among others.

However, paradoxically, existing research on GEP does not always incorporate processes of globalisation into its analytical framework, at least in a comprehensive way. Quite often, research on the topic does not provide an account of how and why policies are globally constructed and settled in global agendas. They are focused on the international dimension of the policy process, i.e. they look at the transfer of policies 'within countries and across countries' (Stone 2004, p. 545) or as a 'boundary-crossing practice' (Peck et al. 2010, p. 169), but do not grasp the global dimension that education policy-making is now acquiring. Another habitual problem in the policy transfer literature is that it often implies a dichotomist split between the local and the global 'levels' and represents them as separate layers of educational governance (Mukhopadhyay et al. 2011). When doing so, research fails to capture the complexity of global politics and the fact that different political scales are mutually constituted (Robertson et al. 2002). Furthermore, much research on GEP does not provide sufficiently rich empirical evidence on the interplay between processes of globalisation and the re-contextualisation of education policy in local places. Doing so is methodologically challenging, but if we attempt to understand education policies globally, the study of the

complex relationships between global ideas, its dissemination and re-contextualisation becomes a key task (Ball 1998).

This book contributes to addressing these and other challenges that globalisation poses in education policy analysis. Its main objective is <u>to analyze the reasons, agents and factors behind the globalisation of educational policy and, by doing so, reflect on the structures, processes and events through which a global education policy landscape is being constituted</u>. Contributions to the book provide an in-depth theoretical and empirical understanding of educational change and education reform in an increasingly globalizing world. The authors are a mix of established and up and coming, Southern and Northern, scholars with great expertise in the analysis of specific global programmatic ideas. The book also draws on the special contribution of Roger Dale and Gita Steiner-Khamsi. In their concluding remarks, these two distinguished scholars look at the GEP phenomenon and, in particular, to the cases collected in the book, with the different theoretical lenses through which they look at the globalisation-education relationship, and as a way to develop some crucial and original insights.

The case studies collected in the volume reflect, on the one hand, on the capacity of international organisations and other political actors to shape education agendas and disseminate education polices globally. On the other, they analyze the complex process of the re-contextualisation of global policies at the country level, and their effects on educational governance. India, Brazil, South Africa, Turkey, Kenya, Uganda and Central-America are some of the locations in which the case studies have been developed. In the different studies, authors look at the globalisation-education relationship from multiple theoretical perspectives, including neo-institutionalism, constructivism, international political economy and social movements theory, and by applying different methodological approaches, mainly qualitative, such as comparative analysis, the vertical case study or discourse analysis. Despite their diversity, all chapters in this volume converge on the idea that processes of <u>globalisation</u> have drastically altered the education policy landscape across the world and, more particularly, in developing country contexts.

To a great extent, this book focuses on the **developing world** due to the particular nature and intensity of global influences therein. Developing countries, especially Less-Developed Countries, are often highly dependent on foreign expertise, information and financing (Rose 2007). In fact, in low-income contexts, there is a bigger presence of external actors including international NGOs, donor agencies and international organisations (IOs) that have a great capacity – both material and ideational - to set agendas and country priorities. In this sense, these countries' policy landscapes are much

more penetrated than countries in more industrialized societies (although the current financial crisis and the way it is being managed in many European countries is challenging this premise). Furthermore, from the point of view of policy transfer, developing states are not only the object of a more intense flow of external pressures, but also depend on hindered capacities to mediate supranational policy pressures (Grek et al. 2009).

Taking globalisation 'seriously'

While notoriously slippery and expansive (Rupert 2005), today, globalisation is a very well established term in the social sciences. It can be broadly defined as a constitutive process of increasing interdependence between people, territories and organisations in the economic, political and cultural domains. The dominant processes of globalisation can be characterized as hyper-liberalism in the economic domain, governance without government in the political domain, and commodification and consumerism in the cultural one (Dale 2000). Globalisation is a very convenient concept for social scientists due to its euphemistic character and due to all the meanings it subsumes within it. Nevertheless, on occasions, referring to the <u>supranational</u> would be more accurate than to the <u>global</u> since many of the trends we are witnessing in education policy have a regional (and not necessarily global) scope.

Taking globalisation seriously implies capturing the multiple ways globalisation affects education policy. In the following lines, we detail a comprehensive, although not exhaustive, list of impact dimensions of globalisation in education policy. Some of them will then be further developed in this introductory chapter.

• Globalisation generates new inputs for education policy-making and <u>defines new problems that education policy needs to address</u> (Ball 1998). Among them, the transformation of the labour market and the re-organisation of work worldwide standout. In a global economy, most countries aim at raising their international competitiveness by offering knowledge-intense products and services, and new manpower profiles. Accordingly, they expand education and base its contents and processes on skills, competences and the notion of flexibility (Carnoy 1999).

• Globalisation, or the 'idea of globalisation' (see Hay 2006), <u>alters the capacity of welfare states</u> to address education and non-education problems via education policy, as well as their capacity for providing and financing education directly.

- Globalisation <u>revitalizes the role of international agencies</u> in the making of educational policy. Among them, international governmental organisations (IOs) with an explicit or implicit education mandate, such as the World Bank, the OECD or UNESCO, stand out. However, globalisation also brings new international players into education policy-making, most of which are non-governmental, including transnational corporations and foundations, international consultants, transnational advocacy coalitions and epistemic communities.

- The revitalized role of international players in educational politics contributes to the <u>deterritorialisation of the education policy process</u> and to the 'national' territory losing its centrality in such processes (Robertson in this volume). Deterritorialisation implies the redefinition of the scale, the space and the dynamics through which education policy is being negotiated, formulated and implemented. International players have an increasing capacity to settle education agendas and define the priorities of countries concerning education reform processes, but also to impose certain policies via funding mechanisms and aid conditionality.

- Beyond the formulation and dissemination of policies, some IOs have the capacity to <u>transform the legal framework</u> of member-countries and, by doing so, alter the rules of the game through which policies are being formulated. The most remarkable case here is that of the World Trade Organisation (WTO) that, through the General Agreement on Trade in Services (GATS), modifies a range of in-country 'regulatory barriers' to cross-border trade in education including ownership, taxation, licensing or quality assurance rules (Verger 2009).

- The advances in <u>Information and Communication Technologies (ICT*),*</u> which are, at the same time, cause and consequence of globalisation, allow the intensification of the international circulation of policy ideas (Peck et al. 2010). ICT are also transforming education practices and the patters of education delivery by, for instance, reducing the costs of cross-border distance learning.

- Globalisation also creates a <u>transnational private market of education provision</u> that complements and/or competes against national education providers. This emerging global market challenges some of the core functions of conventional education systems such as 'nation building' (Robertson et al. 2002).

- <u>Neoliberalism,</u> as the currently dominant political-economic ideology worldwide, frames many of the education policy ideas that circulate (Ball

2007). Proposals such as the introduction of market mechanisms and logics (choice, competition, decentralisation), the liberalisation and privatisation of the education sector, and the importation of management techniques coming from the corporate sector resonate in the neoliberal ideational context.

- Globalisation fosters the organisation of <u>transnational social justice movements</u> that struggle for the realisation of education as a global public good and its endorsement as a human right. At the same time, these movements contest the neoliberal global education agenda sketched above. In the education for development field, the most remarkable organisation with these objectives is the Global Campaign for Education (Mundy et al. 2001). Importantly, it is not only civil society movements that are reacting to the expansion of neoliberal policies. Like-minded coalitions of nation-states, such as the ALBA[i] countries in Latin America, are pushing for a counter-hegemonic regional education agenda that includes aspects such as increasing state intervention in education or the so-called decolonisation of the curriculum (Muhr 2012, forthcoming).

In conclusion, globalisation needs to be first and foremost understood as a new terrain, the new <u>'context of contexts'</u> (cf Peck et al. 2010), of education policy. It defines the problems to be addressed and, at the same time, alters the capacity of the states to respond to these problems by themselves; it empowers international actors and makes the transnational organisation of policy networks more pressing; and is a strategically selective and conflicting terrain for educational policy making, which is more conducive to certain education policy ideas and political actors than others.

Global Education Policy Studies: Methodological considerations

Globalisation has altered education policy, but also the way we think about and study education policy. Global Education Policy is an emerging area of research that examines <u>the different ways in which globalisation processes, agents and events contribute to educational policy change at a range of scales, and with what consequences.</u> GEP studies raise important theoretical and methodological implications for education policy analysts. The shaping of this new area does not simply mean introducing globalisation as a 'topic' onto the educational research agenda, but rather revising certain theoretical postulations, models of analysis and research methodologies (Green 2003). Many of these implications have to be seen in relation to the changing relationship between the state and education in a global setting.

The first and most obvious of these implications is that globalisation challenges the basic unit of analysis, the nation-state, and, accordingly, the <u>methodological nationalism</u> that predominates in educational research and in

comparative education in particular (Green 2003; Dale et al. 2007). Based on a Westphalian understanding of political authority,[ii] education policies have been traditionally developed within national settings. However, today, national policies are the result of a 'combination of political forces, social structures, cultural traditions, and economic processes entangled in a matrix of intersecting multi-level, multi-scalar (local, national, regional, and global) sites and spaces' (Yeates 2001, p. 637).

Directly related to the latter, a second challenge consists on overcoming the global-local binary and the understanding of the relationship between the national and the global as a zero-sum (Dale 2005). The concept of scale, instead of that of level, is helpful for this purpose because it allows an understanding of the production of space as a mutable product of social relations and struggle in which the global and the local are mutually embedded (Robertson in this volume). Transcending the global-local binary means the problematisation of the state as a merely 'national' entity. Many state components (ministries, departments) and bureaucrats operating within the state are networked or, at the same time, part of IOs (usually identified as the 'global' level). In fact, IOs are not something external to the state; in any case, it would be more accurate to say that IOs are more external for some states than for others or, in other words, that they are more owned by some states than by others - see the unequal distribution of power and bargaining capacity in Jawara and Kwa (2004) for the case of the WTO, or in Woods (2000) for the World Bank.

Bourdieu's concept of 'field' contributes to overcoming the local-global binary in the analysis of GEP. Thus, rather than understanding policy borrowing or transfer as the simple correspondence or influence between two institutions (like IO-state), it is more accurate to consider that a global education field, which interacts with the broader social context of international development, is being constituted (Vavrus 2004). Fields need to be understood as conflicting terrains in which different actors struggle for their transformation or reproduction (Bourdieu 1999). The increasing political dimension acquired by international standardized tests such as PISA and global targets such as the EFA goals, and the corresponding international comparisons; the growing cross-border flows in trade in education and scholars mobility; the generation of funding mechanisms such as the Fast-Track Initiative (now called Global Partnership for Education), etc, etc. have generated growing awareness among policy-makers, scholars and practitioners of being part of a common 'global education policy' field. In this field, an official from an IO and a teacher in a Peruvian rural school intersect in the production and reproduction of policy texts and practices (Lingard et al. 2005). However, not all actors are equally influential in the GEP field. Key international policy players and policy entrepreneurs, with the capacity to transcend different scales at any moment,

have more chance of introducing their ideas, preferences and languages in this field.

Thirdly, globalisation urges us to transcend educationism (Dale et al. 2007). Thus, when analyzing new policy trends, policy changes and/or regulatory transformations in the educational field we have to consider that these elements may be shaped by extra-educational structures, events and processes (such as the prevailing welfare regime, the levels of poverty and social cohesion or the economic performance in a country). The comparative education mainstream is still strongly marked by a disciplinary parochialism that encourages researchers to base education policy studies on approaches that exclusively come from within the field of education (Dale 2005). To overcome this problem, educational changes should be better understood as being as embedded within interdependent local, national and global political economy complexes (Novelli et al. 2008).

A fourth challenge concerns methodological statism, i.e. assuming that the state is a rationale and cohesive entity, and that it has the monopoly over political action within the borders that delimit a territory. Overcoming statism implies, first, that the state cannot be understood as a monolithic unit of analysis, but as a range of diverse apparatuses that represent distinct material condensations of social forces (Hartmann 2007). In fact, the different (and differentiated) factions constituting the state usually push for diverging, and sometimes even contradicting, interests and agendas (Cox 1995). For instance, in education, it is quite common that, within the same country, the Minister of Education and the Minister of Finance have very different preferences about the amount of public resources needed in the education system. In some countries, this has generated interesting alliances between the EFA civil society movement and the Ministry of Education to pressure the Ministry of Finance with the objective of obtaining more funding for public education (Verger et al. 2012, forthcoming).

Overcoming statism implies, secondly, understanding that non-state actors are relevant political agents in the governance of education (Dale et al. 2007). Recognizing the political relevance of non-state actors does not necessarily mean assuming that the state is becoming less powerful. Rather, it means accepting that the role and functions of the state have been altered and redefined in the broad scenario of governance, that other players are actively participating at the levels of education policies and politics, and that the state is not as autonomous in relation to the definition of certain policy issues as it was in other periods (Hay 2006).

The concept of 'global governance' aims at capturing this increasingly complex policy landscape in which non-state actors, which operate at a range

of scales, gain political authority and presence in a range of policy fields, including education. Global governance also refers to the intensification of the interactions and the embeddedness between different scales in policy processes. According to Dale (2005, p. 132) 'what we are witnessing is a developing functional, scalar and sectoral division of the labour of educational governance'. Funding, provision and ownership of education are carried out by a broad range of supra-national, national and sub-national agents, including IOs, the state, the market, the community and/or the families. To a great extent, the global governance of education means the redefinition of the relationship between education and the state. In fact, today, the state is less inclined towards the direct provision of education and more towards the establishment of standards and evaluation mechanisms that determine whether schools and universities are achieving standards effectively (Neave 1998).

Global governance refers to both 'formal institutions and regimes empowered to enforce compliance, as well as informal arrangements that people and institutions either have agreed to or perceive to be in their interest' (Commission on Global Governance 1995, p. 4). Indeed, currently, states' action and, in particular, their social policies are framed and conditioned by a dense web of international legal and political obligations (Yeates 2001). These obligations include, in the case of education, legal binding agreements such as the GATS agreement or UNESCO conventions, as well as non-binding declarations such as the Education for All (EFA) action framework or the Bologna Process, which have also triggered important educational transformations both in the South and in the North. As Snyder (1999) states, socio-cultural norms and soft-law are also powerful governance devices with regulatory powers.

To sum up, to incorporate processes of globalisation in educational research, the different methodological and epistemological challenges described above need to be faced, and theoretical and conceptual frameworks coming from sociology, political geography or political sciences considered. However, taking globalisation seriously also means the revision of the core questions that frame research agendas and projects. We identify four main sets of interlinked research questions that can contribute to putting globalisation at the center of education policy studies. These questions allow us to analyze the whole global education policy process: from the structural selectivity of certain policies to its actual implementation in particular contexts. Of course, research can often only focus on one or two of these sets of questions, since going through all of them would require a huge amount of data-collection. They are:

1- <u>What is the nature of the relationship between globalisation and processes of educational change? Why is 'global education policy' happening?</u>

2- <u>How are global education agendas and global policy solutions formulated and constituted, and by whom? Why do certain policies become selected and privileged in global agendas, instead of others?</u>
3- <u>To what extent are global education policies being disseminated effectively? Why do local policy-makers and practitioners adopt them?</u>

4- <u>What are the mediating elements and institutions affecting the translation and re-contextualisation of global policies to particular education contexts? What are the specific difficulties associated with the implementation of global education policies in local contexts?</u>

In the following sections we explore how the GEP literature has dealt with these questions and, in particular, the way the case studies included in this book addresses them.

Globalisation's effects on education

There are two main macro approaches that address the nature of the effects of globalisation in education. We refer to, on the one hand, neo-institutionalist approaches, represented by the 'World Society' theory, and, on the other, international political economy approaches, represented by the 'Globally Structured Agenda for Education'.

<u>World society theorists</u> argue that a single global model of schooling has spread around the world as part of the diffusion of a more general culturally-embedded model of the modern nation-state (Anderson-Levitt 2003). The need for nation-states to conform to an international ideal of the rationalized bureaucratic state has led to a process of institutional isomorphism and convergence (Drezner 2001). First and foremost, nation-states expand schooling as part of a broader process of adherence to world models of the organisation of sovereignty (the modern state) and the organisation of society as composed of individuals (the modern nation) (Meyer et al. 1997). In this process, education is a key area for governments to demonstrate to the international community that they are building a modern state.

World-society scholars have validated empirically their thesis by showing, for instance, that school expansion in African countries has not been so related to their level of development (industrialisation, urbanisation, racial and religious composition, etc.) and to the expected educational needs according to these

variables, but to how close countries were to Colonial powers and Western influence (Meyer et al. 1992a).

Their research problematizes the presumption that education measures are applicable globally, independently of the needs and capacities of the countries adopting them. They observe that education policies (but also health, fiscal policies, etc.) are being adopted in a quite routine way all around the planet due to external and internal legitimation reasons. This is something especially challenging for developing countries since they command less resources and organisational capacity than rich countries, but feel similar pressures to comply with educational reform imperatives (Meyer et al. 1997).

World Society proponents have conducted extensive research on curriculum convergence (Meyer et al. 1992b) and, more recently, on institutional isomorphism in higher education policy (Ramirez 2006). However, they are not so focused on education policy change, or specific forms of education reform since, to them, the main point is not whether state policy is exogenously influenced, but the fact that the state itself is an exogenously constructed entity. Nevertheless, some authors follow an analogous institutionalist and culture-centred approach to analyze education reform. This is the case of Schriewer et al. (2004) who argue that decisions on education policy (and, more broadly speaking, the educational conceptions of decision-makers) are affected by the dissemination of a world-level developmental cultural account and education ideology. Based on Luhmann's work, they propose the concept of 'externalisation' to analyze the way policy-makers argue for the necessity of education reform based on external models. Externalisation can be subtle and does not refer to specific models, but to a web of norms and beliefs that make national constituencies more receptive to educational reform. Education reforms are thus today embedded in a universalized web of ideas about development and social problems, 'a web of reciprocal references which takes a life of its own, moving, reinforcing and dynamizing the worldwide universalisation of educational ideas, models, standards, and options of reform' (Schriewer 2000a, p. 334).

Carney (2009), for his part, elaborates the concept of 'policyscape' to provide a similar argument. A policyscape is an ensemble of policy ideas and visions (managerial practices, conceptions of the role of the state in education, the functions of education, etc.) that are shared by a range of political actors operating on multiple scales and affects the way these actors think and decide about education policy. According to him, a transnational policyscape, grounded on the principles of hyperliberalism, is contributing to 'standardizing the flow of educational ideas internationally and changing fundamentally what education is and can be' (p. 68). He shows very convincingly how this

policyscape has effectively contributed to shaping education reform in countries as different as Denmark, Nepal and China.

For her part, Jakobi in this volume shows how different African countries are implementing notions of lifelong learning by aligning themselves to the global discourses disseminated by several IOs in the continent. As the World Society theory would predict, these countries are engaging with the worldwide discourse on lifelong learning even when it does not fit within their particular needs and when they have only scarce resources for implementing it.

International Political Economy (IPE) theories, do not put so much emphasis on cultural or ideational factors, but on economic ones as the main drivers of educational change. According to the Globally Structured Agenda for Education approach (GSAE) the world capitalist economy is the driving force of globalisation and the first causal source of multiple transformations manifested in different policy sectors, including education (Dale 2000).

The World Society model has an implicit theory of the state in which legitimation, both internally and externally, is the main problem to be addressed by the state. In contrast, for the GSAE, apart from providing the basis of legitimation, the core problems of the state include supporting the regime of accumulation and providing a context for its reproduction (Robertson et al. 2002). These problems cannot all be solved together, and solutions to them tend to be rather contradictory. These contradictions provide the dynamic of educational systems and frame the state educational agenda. Globalisation has significantly altered the nature of the core problems confronting nation-states as well as the nature of their capacity to respond to them (Dale 2000). As we develop below, economic globalisation needs to be seen as a political force with great capacity to structure a global education agenda.

IPE approaches focus on the indirect effects of globalisation in education, and not exclusively on the direct influences between countries or between IOs and countries. They suggest that the most important way globalisation is affecting education policy is by altering the structural conditions in which education reform happens, including the conditions in which reform is framed and perceived by policy-makers as necessary. A good example of how globalisation altered the structural conditions of educational governance can be found in the World Bank/IMF sponsored Structural Adjustment Programmes (SAPS) implemented in Latin American and African countries in the 1980s and 1990s. The SAPS had serious repercussions in education by, first, lowering the public budget necessary to fund educational expansion and, second, raising the levels of poverty and, consequently, the opportunity costs of schooling (Bonal 2002). The new social structure after the SAPs period

became highly conducive to the adoption and implementation of Conditional Cash Transfer policies, which contribute, via economic incentives to the families, to poor students being enrolled in schools (see Bonal et al. in this volume).

For IPE scholars, economic globalisation, and the competitive pressures associated with this phenomenon, are provoking educational changes all around the planet. Globalisation is putting governments under financial pressure to control inflation and the public deficit and, as a consequence, to reduce public spending growth and find out alternative funding sources to cover educational expansion. In fact, many governments believe that, in a global economy, they have to reduce the rates of corporate taxation to avoid capital moving away from their jurisdiction. In this intensely competitive economic environment, finance-driven reforms such as privatisation and decentralisation become highly attractive (Carnoy 1999).

Furthermore, most political and economic actors, including state actors (Cerny 1997), aim to raise their competitiveness and perceive education and knowledge as key competitive assets for this purpose (Brown et al. 1996 Carnoy et al. 2002). This is also the case of individuals that increasingly conceive education as a 'positional good' (Marginson 2004) in a highly competitive and dualized labor market. These beliefs have spread to the point that most countries and regions in the world aspire today to become 'knowledge economies'. The knowledge economy idea works as a powerful economic imaginary (Jessop et al. 2008), or a 'political condensation' (cf. Ball 1998), that frames the preferences of political actors and guides the way they intervene in society. This imaginary puts education at the centre of the economic strategies of governments due to its crucial contribution to the formation of knowledge-intensive manpower, applied research and knowledge transfer (Barrow et al. 2004). The knowledge economy ideal is often associated with an educational reform jargon based on the principles of quality, learning, accountability and standards (Carney 2009).

The emphasis given by IPE approaches to the 'knowledge economy' idea shows that there is room for reconciliation between materialist and idealist approaches when it comes to explaining educational change. Although, for IPE scholars ideas are usually subordinated - an 'entry point' - to material factors when it comes to understanding changes in the political economy of education. Novelli and Lopes-Cardozo in this volume demonstrate the complex interplay between discourse and material factors, when analyzing the way Dutch aid to education in conflict affected low-income countries is conditioned by the powerful influencing role of the World Bank and DFID, despite its status as a wealthy Northern donor. This reflects a global hierarchy within Northern donors as well as between them and their Southern partners.

IPE approaches problematize globalisation's effects in education for two main reasons. First, because they provoke neoliberal and efficiency-driven types of reforms that, among other implications, put education equity in the background (Carnoy 1999). Second, due to the weakening of sovereignty that they imply. The main problem here is that globalisation favours important education decisions being taken within transnational networks rather than by institutions democratically elected (Moutsios 2010).

Poppema in this volume shows how School-Based Management initiatives in Central America, spearheaded by the World Bank and USAID, were powerfully promoted across the region. These policies were complicit in weakening processes of participation, leading to the 'depolitisation of socio-economic relations', and the promotion of de-facto privatisation of education. In this case, 'progressive' discourses aimed at giving poor people more 'voice', appear as mechanisms merely to support the smoother functioning of neoliberal reforms in education (see also Edwards and Klees in this volume).

Setting education policies in global agendas

The two approaches described above focus on the structural conditions that favour the selection and retention of particular policies. However, GEP studies are also attentive to the more micro-level types of analysis concerning how policies are settled in global agendas and by whom. As we show in this section, there is a range of research that looks at the structuring capacity of particular actors and focuses on decision-making dynamics in multi-scalar political systems.

The literature on global agenda setting usually refers to the <u>key role of IOs</u>. According to the World Society approach, IOs contribute to policy convergence in education by spreading the Western system of political organisation and state authority around the world (Meyer et al. 1992a). However, this approach seems to put all IOs, including international NGOs, in the same package of Western modernizing agents. Certainly, IOs might represent Western modernity broadly speaking, but when we look at them in more detail we observe that they express divergent and even rivalling education agendas. For instance, Robertson (2005) analyzes the different meanings of the 'Knowledge economy' label that the OECD and the World Bank are trying to fix, and shows how the latter favours the market and individualism as the means for developing knowledge economies, while the OECD favours a more institutionally embedded liberal approach to knowledge production. **Edwards and Klees,** in this volume, reflect on the way political actors, including IOs and international aid agencies, operating at a range of

scales compete to promote different meanings of participation policies in education. They demonstrate the way participation in educational governance is 'predominantly neoliberal–instrumentalist in purpose, limited in nature, and imbued with market ideology'. See also Mundy (1998, 1999), Chabbott (2003), Jones (2006) or King (2007) on the competition between IOs such as UNESCO, UNICEF and the World Bank to frame and dominate the education for development field.

For IPE theories, IOs are conceptualized as key transmitters of particular views of education and educational reform, basically instrumental and market-oriented, to national contexts. Roger Dale (1999) systematizes a range of policy mechanisms activated by IOs and other external actors that allows them to frame and influence national and sub-national education policies (see Box 1.1). In recent decades, these global mechanisms have acquired more centrality than traditional mechanisms of bilateral influence such as `policy borrowing' and `policy learning' (Dale 1999).

Box 1.1. Global mechanisms of influence

• Imposition*:* external actors compel some countries to take on particular education policies (the classic example being the conditionality to credit of the World Bank, the IMF and other aid agencies to borrower countries).
• Harmonisation*:* a set of countries mutually agree on the implementation of common policies in a certain policy area (e.g., the configuration of the European Space for Higher Education);
• Dissemination: external agents use persuasion and its technical knowledge to convince countries on the implementation of certain policies (e.g., through annual reports, best practices data-bases and technical assistance);
• Standardisation*:* the international community defines and promotes the adhesion to a set of policy principles and standards that frame the countries' behavior (e.g., international performance tests, such as PISA, contribute to the standardisation of curricular content at the global level);
• Installing interdependence occurs when countries agree to achieve common objectives to tackle problems that require international cooperation (e.g., climate change, 'education for all').

Source: Adapted from Dale 1999

IOs are forums of cooperation and struggle between nations. However, they are more than the aggregate of the interests of their member states. Even if they are usually instrumentalized by the most powerful states, they are not simply the extension of particular national interests (Dale 2005). A range of

scholars, often based on constructivist approaches, conceive IOs as relatively autonomous sources of power. To them, IOs, and specifically, their bureaucracies are not exclusively at the service of member-states. They count on sufficient autonomy to interpret and redefine the broad political mandate of the organisation, and to exercise power over members, even when they do not have formal political power. The main sources of power of IOs bureaucracies relies on, first, the legitimacy of the rational-legal authority that they represent and, second, their control over information/data and technical expertise (Finnemore 1996).

According to Barnett et al. (2004), IOs exercise power by organizing three types of apparently apolitical and technical actions. They are, first, classifying the world, for instance, by stratifying countries according to their level of performance in international evaluations such as TIMMS or PISA and, according to their results, putting governments under great pressure to introduce education reforms. Secondly, fixing meanings in the social world by, for instance, defining what educational development means. This is something that IOs can do explicitly, but also indirectly in the form of indicators and benchmarks. And, thirdly, articulating and disseminating new norms, principles and beliefs by, for instance, spreading what they consider 'good' or 'best' practices' in educational development.

Departing from the assumption of IOs as autonomous sources of power, some researchers have analyzed the organisational culture and the internal divergences within IOs to understand the particular education polices they disseminate globally. Several of them focus on the role and strategies of IOs officials when it comes to push for their preferences and approaches to educational development. Thus, Heyneman (2003) provides us with a complete story of how and why rates of return analysis has become the most important analytical tool to guide World Bank education policy since the eighties, and about the divisions this has generated between economists and educationists within Bank staff. For their part, Mundy et al. (2011) have reflected on the internal division among the officials of the World Bank Group concerning the promotion of education privatisation in developing contexts. They apply the 'organized hypocrisy' concept (i.e. the disjuncture between the official discourse of IOs and their actual practices as a way to deal with external pressures, demands and expectations) to understand, in part, the reasons for this division.

Beyond IOs

International actors other than IOs, by using norms and ideas as tools of power, play an important role in global education politics as well. Educational scholars, among others, have focused on the role and impact of epistemic

communities (Chabbott 2003), transnational civil society networks (Mundy et al. 2001), networks of international consultants and policy entrepreneurs (Ball 2007; Robertson et al. 2012, forthcoming) or international foundations (Srivastrava et al. 2010). These pieces of work show that, under some circumstances, different types of non-state actors can mould state preferences over various policy options or help states to identify their interests, above all in moments of uncertainty. At the same time, they also show how these new actors are becoming an integral part of emerging forms of global governance and count on an increasing capacity to provoke processes of policy transfer and learning, or to introduce issues into global policy agendas.

The power of non-state actors in international politics is not something new. This type of actors has traditionally influenced international forums and agreements through the state. However, more recently, we have witnessed how multilateralism is moving away from an exclusively state based structure, and how private actors play an increasingly relevant role in multilateral structures. In this emerging 'complex multilateralism' (O'Brien et al. 2000), non-state actors have more spaces and opportunities to influence IOs directly, and without the necessary mediation of the state. Examples of 'complex multilateralism' in the educational sector can be found in the membership of the Global Campaign for Education and the World Economic Forum in the board of the Global Partnership for Education, or on the role of transnational corporations (TNCs) in educational assistance structures.

TNCs such as Microsoft are promoting educational programmes and establishing bilateral relations with Southern countries, as traditional donor countries would do (Bhanji 2008), or provide international organisations such as UNESCO with funds (Bull et al. 2007). These emerging forms of private authority in education are under suspicion due to the fact that private players are usually policy advocates and service providers at the same time (Deacon 2007). For instance, Microsoft and other ICT companies are using corporate social responsibility to open markets abroad (van Fleet 2012, forthcoming), or big consultancy firms such as CfBT are advocating for PPPs using scientific arguments, but at the same time benefiting from PPP contracts all around the world (Robertson et al. 2012, forthcoming).

Social movements and advocacy coalitions are also adopting pluri-scalar political strategies to achieve their objectives. When their access to the state is blocked for whatever reason, it is quite common for them to try to influence national policies by activating international agreements. This is a political strategy that has been labelled as the 'boomerang effect' (Keck et al. 1998). Soeterik and Santos in this volume demonstrate how the Brazilian Black Movement successfully utilized a 'politics of scale' to strengthen their national

movement and made the Brazilian government comply with several policy measures, particularly through their engagement with the World Conference Against Racism, Racial Discrimination, Xenophobia and Related Intolerance in Durban in 2001.

New actors have very different interests and reasons to become involved in the global education field. However, they have in common that are knowledge-intensive entities, and that their main power source relies on knowledge and ideas (TNCs being an exception to this premise due to the huge material power they also count on). Thus, most of them are gaining authority in global governance structures because of the scientific knowledge they posses, their track record for problem solving and, in the particular case of civil society networks, their principled-oriented views to the problems they deal with (Keck et al. 1998; Haas 2004).

However, being knowledge actors does not mean that international players are continuously innovating and/or producing new policy alternatives. Most of the time, policy entrepreneurs sitting in international foundations, think-tanks or IOs act more as brokers and framers, than as pure theorizers. They usually take already existing policy practices, re-label them and sell them around. Many global education policies have started their journey in this way, being first formulated and implemented in particular countries. School-Based Management originated in the UK (Ball 2007), OBM in New Zealand (Spreen 2004), or charter schools in the US (Bulkley et al. 2003). Since most global policy-entrepreneurs come from the Anglo-Saxon world, it does not come as a surprise that their policy référentiels come from Anglo-Saxon countries. There are some exceptions, however. For example, Conditional-Cash Transfers schemes started being implemented in different localities of Brazil and Mexico and, later on, they became adopted by the World Bank and other regional development banks (see Bonal et al. in this volume).

Adoption: why do policy-makers buy GEP?

The adoption moment is the other side of the coin of the globalizing policy phenomenon. For education policies to become effectively globalized, they need to be adopted in particular contexts by policy-makers. In fact, once a particular policy programme is being adopted in a critical number of locations, we can start considering that some sort of policy convergence in education would be happening. Often, countries adopt GEPs because they are externally imposed via aid conditionality (see Box 1.1). However, from an analytical point of view, it is also relevant to understand why it is that local policy-makers voluntarily adopt GEPs.

A first type of answer to this question would say that local policy makers implement global policies because these policies 'work'. In this case, we would be assuming that policy-makers are well-informed rational actors that choose the best and internationally tested policy solutions to improve their education systems. However, interestingly enough, it is not always clear whether many GEPs work or not, or under what conditions they do so. For instance, diverse policies such as quasi-markets or Child-Centred Pedagogies have been extensively criticized for their uneven and even negative impacts, and this has not prevented them from continuing to be disseminated around the world (Luke 2003, Altinyelken in this volume).

A more nuanced answer to the GEP adoption question would say that policy-makers adopt GEP because they <u>perceive</u> these policies work. In this case, policy-makers would perceive GEP as appropriate policy solutions in their countries for educational, but also political and economic reasons. The literature is very rich on explanations and hypothesis related to this line of argument. Different research places the emphasis on a wide range of elements, from the persuasive capacity of global agents, to the capacity of local actors to instrumentalise the global arena to advance pre-established policy preferences. We explore the most relevant of them in this section.

<u>Framing matters</u>. IOs and, more broadly speaking, global policy entrepreneurs are very active, and even compete among themselves, to make policy-makers perceive that their policy ideas work and have an impact (Steiner-Khamsi 2004). In general terms, more than the internal consistency of policy ideas, the way they are framed and presented affect policy-makers decisions on whether to buy or not a certain policy (Verger 2011). IOs know this well and put a lot of resources and effort in dissemination. Global policy ideas are launched and spread through highly distributed policy briefs, papers and reports, and in public or private events (seminars, workshops, report launches, etc.) that are usually well attended by national political leaders and policy-makers (Ball et al. 2010). Despite IOs use of an apparently neutral and technical discourse, at the same time, they strongly advocate their proposals often with great enthusiasm. To frame GEP ideas in an appealing way, IOs need to present them in a clear and concise manner. Moreover, new policy ideas are most likely to be taken up if they are perceived as technically workable, and fit within budgetary and administrative constraints (Kingdon 2002). Not surprisingly, most education policy entrepreneurs highlight the cost-effectiveness and efficiency gains of the policies they are promoting.

However, framing strategies are often in dispute with scientific rigor. In order to sell their ideas and frame them in a more convincing way, policy entrepreneurs might on occasion need to, more or less explicitly, simplify reality (Ball 1998) and resort to different types of logical fallacy and

argumentative shortcuts (Verger 2011). In fact, beyond their argumentation strengths and consistency, GEPs often maintain their credibility through repetition (Ball 2007; Fairclough 2000). Indeed, the international travelling of education policies has been strengthened by the consolidation of the evidence-based policy idea (i.e. basing policy decisions on research that shows what kind of policies 'work'). In fact, evidence-based policy has been welcomed by many policy-makers and donors as a superior way of taking decisions, even when it is well-known that evidence can be easily instrumentalized to support the adoption of certain policies instead of others (see how this bias affects the international debate on quasi-markets in education in Luke 2003 or Verger 2011).[iii]

Global status and deterritorialisation. As pointed out earlier, all policies have an origin, which is usually Western and, more precisely, Anglo-Saxon. Because of this reason, it is useful to think about GEPs as globalised localisms (cf. Santos 2005). Likewise, once a critical number of countries borrow a policy, it seems like its particular origins vanish; it becomes *global* and is traded as a *global model* (Steiner-Khamsi 2010). The acquisition of 'global status' raises the attractiveness of policies and predisposes policy-makers to discuss educational reforms guided by them.

Apart from the global status of policy ideas, the global prestige of the actors backing them is similarly important. Usually, the most successful policy entrepreneurs are based in IOs that are located at the interstices of a range of influential social and policy networks (Campbell 2004). Indeed, in many countries, the opinion of a World Bank expert will be more considered than that of a scholar from a local university, even if they have a similar high-quality training and propose the same successful or failed policy ideas. The definitive move for a policy to become globally traded comes when a global institution that counts on high levels of exposure and good networks adopts it. On occasions, social networks are key to understanding this type of movement. For instance, Outcomes-Based Education became a global policy in part because one of the promoters in New Zealand, Maris O'Rourke became tenured at the World Bank (Steiner-Khamsi 2004).

GEP selectivity. Some scholars consider that policy-makers perceive importing new policies from elsewhere as necessary when the situation of their education systems is critical. Phillips et al. (2003) use the concept of 'impulses' to refer to the preconditions for borrowing. Impulses include an eclectic set of elements such as internal dissatisfaction with the education system on the part of families, teachers, etc.; the collapse or inadequacy of educational provision; negative external evaluation; political change and the changing demands for education; and so on.

IOs play a key role in some of these aspects, especially when it comes to making countries aware of the necessity to implement reforms, and becoming more receptive towards their policy recommendations. International standardized tests such as PISA have generated a feeling of reform urgency even in powerful countries such as Germany and Switzerland (Bieber 2010). In developing countries, the EFA Actions Framework and, in particular, the fact that many countries are still far from reaching the EFA goals is working as a great political opportunity for many IOs and policy entrepreneurs trying to sell their policy prescriptions.

In general, those policies that resonate best within the prevailing form of the capitalist system and the prevailing development policy paradigm will have more chances of being retained in global agendas and selected in particular countries (Dale 2000). From a semiotic perspective, neoliberalism and related policy discourses have become hegemonic, and a sort of common sense. Ideas such as performance-based incentives, competitive funding, education as a competitiveness device, etc. have been interiorized by many decision-makers and practitioners (Carney 2009). As a consequence, this type of market-oriented principles is shaping the parameters of policy-making in many countries (Taylor et al. 2000). However, at the same time, governmental decision-makers often reject hard-privatisation policies. That is why, to make them more normatively acceptable, most IOs promoting quasi-markets in education avoid using the 'privatisation' concept and use instead more friendly concepts such as PPPs (Robertson et al. 2012, forthcoming).

Instrumentalizing GEP. Steiner-Khamsi (2004, 2010), on the basis of intensive fieldwork in several Asian countries, concludes that local policy-makers have a double register in their education policy discourse; they speak differently to local constituents than to international donors. Policy-makers adopt the international language of reform as a way of securing international funds but, once they get them, they implement the type of reforms they consider more relevant and go ahead with business as usual. Thus, according to this scholar, more than global policies, what is being actually disseminated is a global policy speak. This is indeed a sceptical approach to globalisation's effects in policy change that breaks with the usual approach that perceives developing countries as victims of IOs and passive-recipients of global ideas. In this volume, Verger and Van der Kaaij show that, in India, the global PPP idea, beyond an external imposition, works as a floating signifier for local actors to settle national and sub-national education agendas, and advance their pre-established preferences in the educational field.

Although following a different reasoning, Martens et al. (2009) also consider that countries instrumentalise the global arena to advance certain policy reforms. They consider that countries approach global institutions to reduce

transaction costs for problem solving and policy formulation purposes, but also to gain leverage at the domestic level when it comes to advancing policy changes. From this point of view, global policy recommendations would be instrumentally invoked by policy-makers for legitimatory reasons and as a way of softening internal resistance. The Bologna process has been, to some extent, manipulated in this way by a range of European countries to advance pre-established governmental policy preferences (Huisman et al. 2004). In her analysis of the political dimension of PISA, Grek (2007, p. 35) makes a similar point when she states that 'reference to "world situations" enables policy-makers to make the case for education reforms at home that would otherwise be contested'.

Re-contextualisation and implementation

Methodologically speaking, research on the recontextualisation of GEP traces the translations of policy programmes, and tries to find out about the multiple relationships that reconstitute such programmes in multiple scales (Mukhopadhyay et al. 2011). Experiences from the field tell us that we should question those hyperbolic arguments about globalisation as a driver of absolute world convergence of policy and practice in education. Most scholars agree on the fact that globalisation is not an absolute project with identical effects in all places (Appadurai 1996; Robertson et al. 2006). Although globalisation presents common features around the world, the effects of globalisation in education policy are mediated by domestic history and politics, and by the complex interplay of global and local forces, among other contingencies.

Research stresses that borrowed policy ideas are modified, indigenised or resisted as they are implemented in the recipient countries (Schriewer 2000b; Philips et al. 2003; Steiner-Khamsi 2004; Steiner-Khamsi et al. 2006). According to Peck et al. (2010, p. 170) global policies mutate during their journeys, they 'rarely travel as complete packages, they move in bits and pieces - as selective discourses, inchoate ideas, and synthesized models - and they therefore "arrive" not as replicas but as policies already-in-transformation'. Ball (1998), who focuses on the globalisation of education policies that emanate from what he calls the 'new orthodoxy', considers that policies are rarely translated into policy practices in pristine form. One of the main reasons for this to happen is that policies, beyond a 'text' that is easily transferable across scales, are also part of an often-disputed technical and political debate that is highly contingent and situated.

Altinyelken in this volume looks at how Child-Centred Pedagogy (CCP) was re-contextualised in Uganda and Turkey. Her study points to convergence at a superficial level and around new rituals that have emerged as a result of the

dissemination of CCP. However, her findings indicate more strongly the persistence of divergences across countries as CCP was interpreted differently, the reform practices were embraced unevenly, and adaptations to classroom realities and student background have resulted in very distinct practices. Stenvoll-Wells and Sayed, also in this volume, demonstrate that in several locations of South Africa and Zimbabwe, despite policy rhetoric around decentralisation and school management reform as delivering more power to local actors, there appears little on the ground transformations. In fact, their analysis indicates that a few groups dominated decision-making within the school governing bodies and blocked the participation of many other local agents.

Overall, since imported education policies are locally mediated and re-contextualised through multiple processes, the consequences of transfer remains unpredictable (Beech 2006). By ignoring differences in contextual capacity and culture at the national, regional, and local levels, globalisation has resulted in unintended and unexpected consequences for educational practice such as the deterioration of education quality (Carnoy et al. 2002). The development of global education programmes is often questioned for not taking into account the social context and needs sufficiently (Crossley et al. 2003). In the literature, we find four main arguments that reflect on why the GEP re-contextualisation can be so problematic, especially in developing countries. According to their different emphases, we call these explanations <u>material, political, cultural</u> and <u>scalar</u>.

<u>Material.</u> As Lewin (2007) notes, it is not appropriate to import models that might have worked in consolidated, well-funded, highly professionalized and well-regulated educational systems to places whose educational conditions are far from reaching these standards. Many developing countries often do not have the appropriate material and human resources to implement very costly and technically demanding global education programmes such as quasi-markets in education or accountability policies. The World Bank faces this issue with the projects it finances. In fact, the 2011 report of the World Bank's Independent Evaluation Group finds quite 'uneven results' in the Bank's portfolio of education projects, precisely, due to 'design and implementation weaknesses' including 'overly complex designs relative to local capacities' (IEG 2011, p. 13).

However, local policy-makers are often aware of the resources available and the material needs in their countries when engaging with GEP and, accordingly, adapt global discourses to them. This is for instance the case of many African countries when embracing worldwide principles on life-long learning. Under the life-long learning discourse, African policy-makers basically emphasize adult literacy and basic education, instead of higher

education or alternative qualification frameworks as more industrialized countries do (see Jakobi in this volume).

Bonal, Tarabini and Rambla in this volume show very convincingly how technical capacities and, specifically, the final design of global policies are key mediating factors to understand the outcomes of global policies in the terrain. They do so by comparing the effects of Conditional Cash Transfers in different Brazilian locations on the basis of the intensity of the economic transfer, the targeting criteria and the coverage of the beneficiaries, among other aspects of the policy design.

Political. Political mediations and institutions also shape the adaptation of global policies. A range of case studies emphasizes the mediating role of political factors in the re-contextualisation of diverse policies such as 'education assessment' (Benveniste 2002), 'decentralisation' (Rhoten 2000), or the 'Bologna process' (Heinze et al. 2008).

According to Taylor et al. (2000), political ideology is one of the main reasons why nations do not deliver equally in the GEP field. Specifically, they show that government ideologies (market-liberal, liberal-democratic, and social-democratic) represent a key filter when it comes to adopting the OECD recommendations in educational policy. Martens et al. (2010), for their part, focus on the potential role of national veto players in the implementation and modification of global policies. By veto players they mean political actors who have the power to block or hinder legislative initiatives, such as the senate or the national ministry of education. Although, based on the cases of Bologna and PISA in several countries, they show that when there is a strong political consensus and leadership to advance a certain reform, veto players and veto points can be easily by-passed.

In the political approach, we also identify political economy accounts of education reform that show how, beyond veto players, key professional groups and constituencies are key when it comes to advancing or resisting educational change. Key actors here are teachers unions for primary and secondary education, and university associations in the case of higher education. **Altinyelken**'s work in this volume also reflects on how teachers and other local actors 'sometimes resist and always transform' the official models they are handed (Anderson-Levitt 2003, p.4).

Cultural. Another group of scholars highlights how a range of ideas including policy principles, public sentiments or policy paradigms can mediate effectively GEP implementation. For instance, in many Latin American countries there are strong public sentiments (cf. Campbell 2004) around the idea of education as a public good. Consequently, in this region it is more

difficult to advance privatisation policies than in countries such as India where these sentiments do not prevail and, moreover, there is a historically rooted elitism in society that makes it socially acceptable to not provide the same quality education for all (Verger and Van der Kaaij in this volume). For their part, Santos and Soeterik in this volume show how the strong social belief of Brazil being a 'racial democracy' makes the implementation of racial affirmative policies in the country more challenging.

<u>Scalar.</u> The professionals that ultimately have to make new policies work (teachers, principals, local government officials, etc.) often perceive education reform as something imposed from above. This problem is more striking in the case of global education policies that have been designed and negotiated at supranational scales. Incrementalist approaches tell us that policy changes, to work out smoothly, need to be grounded on previous practices and advance progressively. As bigger is the gap between the new policy and the previous system, implementation processes become more problematic (Rizvi et al. 2009). This 'gap' is usually accentuated in relation to policies imported from elsewhere and initially designed by officials that are unconnected to local realities.

Following this type of reasoning, Steiner-Khamsi (2010, p. 331) argues that, very often, reform failures are not due to technicalities, limited funding, or similar implementation problems. Rather, such failures reflect 'the fundamental contradictions that arise when (policy) solutions are borrowed from educational systems where the problems are entirely different'. Thus, the main implementation problem can be found in the decoupling between the global policy, whose programme ontology has a universalistic pretension, and the local reality, with the particular configuration of problems that predominate therein.

Unterhalter in this volume observes how global targets, inevitably, oversimplify reality, as well as the complexity of the problems that policies are intended to address. The main issue here is thinking that by achieving a specific target, the problem that the target relates to has been solved as well. She shows how this 'political relaxation' effect happens in the case of the EFA gender parity target; once countries have achieved this target, decision-makers consider that they have solved the problem of gender equity, which is much more complex and difficult to measure.

Concluding remarks

Having laid out schematically the landscape of the different methodological and theoretical approaches on globalisation, education policy and international development it is perhaps fitting now to conclude that there

remains a great deal of work to be done. Many of the debates outlined above, beyond their analytical dimension, have hugely important implications for social justice and the right to education around the world. Globalisation, far from producing a flat-world, has increased inequalities both within and between countries, and has altered the cartography of contemporary social relations and education politics. Power, and its unequal distribution, are reflected throughout these pages, and challenge us to think beyond the current mainstream in the education/globalisation relationship and to develop more inclusive, participatory and egalitarian educational policy processes. Hopefully this book can contribute to highlighting the fault lines upon which these principles can emerge.

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[i] ALBA stands for Alternativa Bolivariana de las Américas.

[ii] The basic rules of the Westphalian State are: 1. Authority can only be exercised by a state over a defined geographical territory; 2. Each state is autonomous to develop its own policies; 3. No external actor can direct the state's priorities (Yeates 2001).

[iii] Accordingly to Pawson (2011), this way of using science and evidence to legitimate predefined policy preferences, instead of evidence-based policy, should be called 'policy-based evidence'.