



The Handbook of Global Education Policy

Edited by Karen Mundy, Andy Green,
Bob Lingard, and Antoni Verger

The background of the cover is a photograph of a classroom. It shows several rows of wooden desks and chairs, with a radiator visible in the background. The lighting is soft and warm, suggesting a bright window. The text is overlaid on this image.

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Risto Rinne, *Center for Research on Lifelong Learning and Education and Department of Education, University of Turku*

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The Handbook of Global Education Policy

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List of Acronyms

5DE	five dimensions of exclusion
ADB	Asian Development Bank
AFDB	African Development Bank
ANCEFA	African Network Campaign on Education for All
APEC	Asia-Pacific Economic Cooperation
ASEAN	Association of Southeast Asian Nations
ASER	Annual Status of Education Research
ASPBAE	Asia South Pacific Association for Basic and Adult Education
AUT	Austria
BIBB	Bundesinstitut für Berufsbildung
BIA	Bridge International Academies
BOG	Board of Governors
BRAC	Bangladesh Rural Advancement Committee
BRICS	Brazil, Russia, India, China, and South Africa
BtL	Breakthrough to Literacy
CAN	Canada
CAP	consolidated appeal process
CDA	Critical Discourse Analysis
CDC	CDC Group plc., formerly Commonwealth Development Corporation
CEDAW	Convention on the Elimination of All Forms of Discrimination against Women
CEECIS	Central and Eastern Europe and the Commonwealth of Independent States
CEF	Commonwealth Education Fund
CEI	Center for Education Innovations
CERF	Central Emergency Response Fund
CERI	Centre for Educational Research and Innovation
CH	Switzerland
CIDA	Canadian International Development Agency
CHF	Common Humanitarian Fund
CLADE	Coalition for the Right to Education in Latin America
CME	coordinated market economy

CNN	Cable News Network
COPOME	Cordinatoria Popular de Madres Educadoras
CPE	Cultural Political Economy
CRC	Convention on the Rights of Children
CREATE	Campus for Research Excellence and Technological Enterprise
CSEF	Civil Society Education Fund
DEELSA	Directorate for Education, Employment, Labour and Social Affairs
DFATD	Department of Foreign Affairs, Trade and Development (Canada)
DFID	Department for International Development (UK)
DIBELS	Dynamic Indicators of Basic Early Literacy Skills
EAHEP	EU-Asia Higher Education Platform
ECD	Early Child Development
ECEC	Early Childhood Education and Care
ECTS	European Transfer and Accumulation System
EEPCT	Education and Emergencies and Post-Crisis Transition
EFA	Education for All
EFA-FTI	Education for All Fast Track Initiative
EFTS	Equivalent full-time study
EGRA	Early Grade Reading Assessment
EMI	English as a Medium of Instruction
EPDC	Education Policy and Data Center
EQUIP	Education Quality Improvement Program
ERA	Education Reform Act
ERF	Emergency Response Fund
ESSU	<i>Education Sector Strategy Update</i>
EU	European Union
FAWE	Forum of African Women Educationists
FIFA	Fédération Internationale de Football Association
FIMS	First International Math Study
FR	France
G8	Group of Eight
G20	Group of Twenty
GATS	General Agreement on Trade in Services
GAW	Global Action Week
GBCE	Global Business Coalition for Education
GCE	Global Campaign for Education
GEC	Girls' Education Challenge
GEFI	Global Education First Initiative
GER	Germany
GERM	Global Educational Reform Movement
GIIN	Global Impact Investing Network
GNH	Gross National Happiness Index, Bhutan
GPE	Global Partnership for Education
GPS	Global Positioning System
GTER	Gross Tertiary Enrolment Ratio
HCT	Human Capital Theory
HEI	Higher Education Institution
HPS	High Participation System
IAD	Indicators and Analysis Division
IBRD	International Bank for Reconstruction and Development

ICT	information and communications technology
IDA	International Development Agency
IDP	Internally Displaced Person
IEA	International Association for the Evaluation of Educational Achievement
IEG	Independent Evaluation Group (World Bank)
IELTS	International English Language Testing System
IFC	International Finance Corporation
IGO	Intergovernmental Organization
IMF	International Monetary Fund
INEE	Inter-Agency Network for Education in Emergencies
INES	Indicators of Education Systems
INGO	international non-governmental organization
IT	Information Technology
ITA	<i>Idara-e-Taaleem-o-Aagahi</i>
ITB	Industrial Training Board
JAP	Japan
KIPP	Knowledge is Power Program
LCPS	Low Cost Private School
LEG	Local Education Group
LME	liberal market economy
LPIP	Learner Performance Improvement Plans
LPP	Language Policy and Planning
MA	Modern Apprenticeship
MAI	Multilateral Agreement on Investment
MDG	Millennium Development Goal
MERCOSUR	Southern Common Market
MET	Measures of Effective Teaching
MOOC	Massive Open Online Course
MPF	Manpower Planning Forecast
MSC	Manpower Services Commission
NAFTA	North-American Free Trade Agreement
NAPLaN	National Assessment Program Literacy and Numeracy
NBTL	New Breakthrough to Literacy
NCF	National Curriculum Framework
NCFTE	National Curriculum Framework for Teacher Education
NCLB	No Child Left Behind
NCP	New Colombo Plan
NGO	non-governmental organization
NPM	New Public Management
NRP	National Reading Panel
NUEPA	National University of Education Planning and Administration, New Delhi
OECD	Organisation for Economic Co-operation and Development
OECD-DAC	Organisation for Economic Co-operation and Development-Development Assistance Committee
OOSC	Out of School Children
PALF	Pearson Affordable Learning Fund
PEAS	Promoting Equality in African Schools
PIAAC	Programme for International Assessment of Adult Competencies
PIRLS	Progress in International Reading Literacy Study

PISA	Programme for International Student Assessment
PPP	public–private partnership
PRES	Pôles de recherche et d’enseignement supérieur
PRSP	Poverty Reduction Strategy Paper
PTA	Parent Teacher Association
RoR	rate of return analysis
ROWITE	OECD working party on the role of women in the economy
RTE	Right to Education Act, India
RTI	Research Triangle Institute International
RTS	Read to Succeed
RWS	Real World Strategies
R&D	Research and Development
SABER	Systems Approach for Better Educational Results
SAGE	Strategies for Advancing Girls’ Education
SAP	Structural Adjustment Policy
SAS	Survey of Adult Skills (OECD)
SITAN	UNICEF Situational Analysis
SOCAP	Social Capital Markets
SRGBV	School Related Gender Based Violence
SSA	<i>Sarva Shiksha Abhiyan</i>
STEM	science, technology, engineering, and mathematics
SUK	<i>Schweizerische Universitätskonferenz</i>
SVP	Swiss People’s Party
SWAp	sector-wide approaches
SWE	Sweden
TALIS	Teaching and Learning International Survey
TAN(s)	Transnational Advocacy Network(s)
TEC	Training and Enterprise Council
TFA	Teach for America
TIMSS	Trends in International Mathematics and Science Survey
TNC	transnational corporation
TOEFL	Test of English as a Foreign Language
UCDP	Uppsala Conflict Data Program
UDHR	Universal Declaration of Human Rights
UIS	UNESCO Institute for Statistics
UK	United Kingdom
UN	United Nations
UNDP	United Nations Development Programme
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNFPA	United Nations Population Fund
UNHCR	United Nations High Commissioner for Refugees
UNICEF	United Nations Children’s Fund
UNCRC	United Nations Convention on the Rights of Children
UPE	universal primary education
USA	United States of America
USAID	United States Agency for International Development
VAT	value-added tax
VET	vocational education and training
VoC	varieties of capitalism
WCES	World Council of Comparative Education Societies

WCT	World Culture Theory
WCU	World Class University
WISE	World Innovation Summit for Education
WTO	World Trade Organization
YTS	Youth Training Scheme

Introduction: The Globalization of Education Policy – Key Approaches and Debates

Karen Mundy, Andy Green, Bob Lingard, and Antoni Verger

Education and schooling have long been deeply implicated in processes of internationalization and global economic integration. Throughout the course of modern history, conquering powers, religious movements, and traders each carried with them new approaches to acculturation and learning – perhaps never more prominently than in the 19th and early 20th centuries, when the newly minted educational systems of Western states were carried around the world by colonial powers. Yet it was not until the mid-20th century that education itself became a formal issue arena for international policy-makers and international organizations. The formation of the United Nations Education and Cultural Organization (UNESCO) and the establishment of the Universal Declaration of Human Rights each signaled a new era for global policy-making in education, opening the way to a proliferation of bilateral, multilateral, and non-governmental efforts to influence and transform educational systems and set global educational standards.

Today, governments are increasingly engaged in forms of global educational exchange and policy-making, through membership in such diverse institutions as the Organisation for Economic Cooperation and Development (OECD), the Group of 8 (G8), the World Bank, the European Union (EU), the World Trade Organization (WTO), and the Association of Southeast Asian Nations (ASEAN). International comparison of the performance of education systems is a matter for media headlines, building on the widely accepted view that educational success is a proxy for economic competitiveness. Emerging powers in Asia, the Middle East, and Latin America have created new regional educational organizations and development agencies with keen interest in education policy. Non-state actors and institutions are also increasingly influential – with powerful transnational educational business, professional associations, technology companies, new philanthropies, transnational civil society advocacy

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networks, and the global business community (e.g. World Economic Forum) each actively participating in the construction of new global “policy spaces” for education.

To understand the increasingly complex and pluri-lateral field of global educational policy, we begin the *Handbook of Global Education Policy* by providing an overview of the actors, policies, and contexts – including processes of globalization – which have spurred the expansion of global policy-making in education. In what follows we first look at historical antecedents to global policy-making in education, before exploring globalization and its impacts on educational systems. We then turn to debates about how best to conceptualize and study the mechanisms and processes that drive education policy in this new global era – reviewing theories of convergence, divergence, coercion, and policy borrowing as frames for understanding global education policy. This chapter concludes with a brief section on key issues and policy actors in global education, and a short overview of the organization of this volume.

Antecedents to Today’s Global Education Policy

Education policy has long been understood as the putative domain of the nation state. Sociologists and political scientists, beginning with Max Weber, Emile Durkheim, and John Stuart Mill, recognized that national educational systems arose as part of the apparatus of modern government in the Western world. Education systems complemented the state’s legitimate right to exercise power within national territory, providing a mechanism for socializing citizens and allowing for the authoritative allocation of values. Schooling spread rapidly because of popular demand from citizens and communities – who saw education as an opportunity for personal and group progress. Thus, from the 19th and into the 20th centuries, governments in many parts of the world expanded access to schooling: they achieved near universal enrolment at elementary and later secondary levels, and established publicly funded systems for higher education. Early educational systems, which had often been funded and controlled by religious organizations or communities, were gradually absorbed into nationally funded and controlled public systems; leaving governments to play an increasingly authoritative role in childhood socialization. By controlling the allocation of public resources for education; setting national (and sub-national) curricula and standards; hiring and paying teachers and structuring their work; and owning the schools themselves, schooling and school systems played a central role in constructing what Anderson (1991) describes as the “imagined community” of the modern nation state.

In this context, it is perhaps unsurprising that cross-national education policy borrowing emerged as a persistent feature of national educational policy setting. From early in the 19th century, when national or “public” educational systems were first consolidated in Western Europe and North America, education policy makers and reform advocates were active in analyzing developments in other countries, both to provide evidence on what policies to avoid and on what policies might be usefully adopted at home. State-provided elementary education in Prussia in the 1830s, for instance, offered an influential model that was widely studied by reformers in other countries. The Prussian system of free and compulsory state elementary schooling, with professional training for teachers in state Normal schools, and centrally

controlled curricula, was used as a basis in the 1830s for the Guizot reforms in France and, in part, for Horace Mann's reforms to the education system in Massachusetts in the USA (Green 2013). Reforms to technical and secondary schooling in England in the late 19th century owed much to the advocacy of continental European policies by leading reformers such as the scientist, Lyon Playfair, and the Schools Inspector, Matthew Arnold, both of whom had conducted extensive research on foreign education policies. When the government in Meiji Japan first developed its national education system in the 1870s, emissaries were dispatched to study the education systems in Germany and the USA, and many of the policies in those countries were subsequently adopted or adapted in the development of the Japanese education system.

Yet while examples from the 19th century, and indeed before, of educational policy borrowing are legion, prior to the mid-20th century there are few examples of organized and sustained international policy setting in education. Apart from modest experiments – such as the creation of the International Bureau of Education at the time of the League of Nations, education remained pre-eminently a national concern. Policy borrowing between states occurred primarily through individual reformers' initiatives, without support from transnational organizations.

The end of World War II marked an important departure from this trajectory. The creation of the United Nations and the first international intergovernmental organization with an educational mandate, UNESCO, as well as the establishment of the Universal Declaration of Human Rights (UDHR), placed education on the agenda of a new kind of multilateralism among post-war governments. Focused on building shared principles and values across nations through stronger economic and political interdependence, the new multilateral architecture helped to construct a form of “embedded liberalism” that married together the objectives of building more inclusive economies (primarily through the recognition of the need for social safety nets and greater access to jobs), with greater civil and political freedoms and a more integrated, and a better managed, world economy (through the creation of the Bretton Woods institutions) (Ruggie 1982; Mundy 1998). It is in the context of “embedded liberalism” that education became recognized as a powerful tool not only for constructing more inclusive national economies, but for ensuring a lasting peace based on common values of individual freedoms and shared prosperity. While education would remain predominantly the preserve of national sovereignty in this new global order, for the first time, the need for global standards and cross-national problem solving in education was recognized as an appropriate and important domain for multilateralism.

The breakdown of colonialism and the emergence of a whole new group of independent states after World War II further spurred the growth of international educational policy-making. By the 1960s, newly formed national programs and agencies for delivering foreign aid, as well as international organizations, such as the United Nations Children's Fund (UNICEF) and the World Bank, had begun to join UNESCO in supporting national educational development in newly independent states. The enormous expansion of international flows of policy-making and exchange in education that followed was marked by the uneven and increasingly polarized power relationships across nation states. Education policies became, especially during the Cold War, a prime arena for competition and influence among the Western and Eastern bloc countries. Thus a fragmented and diverse architecture for

international educational policy exchange and influence developed. It included the joint problem solving approach embodied in the educational work of the OECD and other regional organizations; the multilateral (and officially neutral and scientifically driven) activities of such international organizations as UNESCO, UNICEF and the World Bank; and the more self-seeking bilateral flows of aid and advice from richer to newly independent developing countries.

Globalization and the Take-Off of Global Education Policy After 1975

Globalization can be defined as the de-territorialization of social, political, and economic relationships, and the rapid integration of societies across the previously territorially bound units we call “nation states” (Harvey 1989; Ruggie 1993). As noted by Held and colleagues:

Globalization can be thought of as a process (or set of processes) which embodies a transformation in the spatial organization of social relations and transactions – assessed in terms of their extensity, intensity, velocity and impact – generating transcontinental or interregional flows and networks of activity, interaction, and the exercise of power. (Held *et al.* 1999, 16)

While globalization processes have been ongoing since at least the 16th century, scholars of global education policy argue that globalization processes over the past 35 years have set the stage for new types of power and complex pluri-lateral forms of influence on domestic educational systems, creating new and more globalized education policy discourses and a more formalized global policy architecture (Rizvi and Lingard 2010). Heightened integration of economies and markets (though profoundly uneven), accelerated mobility and communication across borders, fueled by new technologies, and the end of the Cold War, have each changed the nature of governments’ strategic interests and their ability to control and contain domestic social and economic trajectories, allowing for emergence of new global policy spaces for education.

For educational systems, and for other putatively national public policy domains, perhaps the first point of impact from globalization has come from the acceleration of economic integration that has occurred since the 1970s, following the ending of the Bretton Woods system of fixed exchange rates in 1971 and the subsequent movement toward financial de-regulation. The rise of transnational corporations, globally integrated production chains, and markets, and increasingly mobile flows of capital, each contributed to the deepening globalization of national economies and the creation of a global economy (Castells 1996; Green 1997; Harvey 1989; Bourdieu 2003). Although each nation state has followed its own unique trajectory in responding to these changes, it is clear that economic globalization had some common effects on education policy. Globalization shifted post-World War II sources of state power by limiting the historical ability of states to tax capital, and redefining trajectories for national economic development and thereby requirements for skills and human capital.

Economic globalization elicited two key types of educational policy responses from nation states. Beginning in the 1980s, *finance driven reforms* – the search for cost efficiencies, the introduction of new forms of user payments, and other sources