

# World Yearbook of Education 2012

Policy Borrowing and Lending in  
Education

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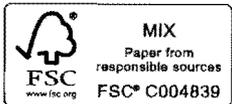
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## Series Editors' Introduction

Since 2006, the current series editors of the Routledge *World Yearbook of Education* have taken advantage of its global reach to focus it on different aspects of the problem of globalisation. In doing this, we are responding to shifts in the global, national, local and institutional scale that have been understood and explained in different ways in research and scholarship in the field of education. One key aspect of these shifts is the preoccupation of nation states and transnational agencies with finding new ways of 'doing governing'. As a consequence we see shifts from hierarchy to network as the preferred model, accompanied by outsourcing of services to hybrid public-private organisations, increasing devolution of responsibility for self-management, choice-making and the management of risk to individuals and families and away from state institutions. Governments cease to be enablers of provision; they are re-defined as market regulators or, more recently as drivers of 'integration' of action and delivery with a range of partners in the provision of services – often organised in networks of hybrid public/private providers.

These ideas reflect cross-border movements of people and ideas, the flow of data and experts, and the influence of apparently shared policy agenda for education and other services following increasingly similar design principles in the reconfiguration of education/learning (education as learning). Policy work no longer operates within closed systems through bureaucratically organised, command and control processes. Rather, the work of making/fabricating governing occurs in complex 'systems' in which cooperation and coordination must be managed. Governing through transnational networks is not constrained by path-dependent thinking at the national scale. In education these changes have been conceptualised as 'top down' globalisation, as globalisation from below, and as combining travelling and local policy pressures.

Recent *World Yearbook of Education* volumes on education in the Arab world, on workplace learning, and on the changing curriculum have tracked and analysed these changes. As we build a reference library through these volumes that offers a global perspective on change in education, located in the very varied contexts in which globalising shifts play out, we have become more and more aware of the significance of the 'governmental technologies' that seek to deliver these shifts and promote or mediate change. Miller and Rose (2008: 55) draw attention to the importance of the 'mundane programmes, calculations, techniques, apparatuses, documents and procedures through which authorities seek to embody and give effect to governmental ambitions', and argue that it is through examination of the interconnections between

political projects and such technologies that we can understand how globalising agendas affect and interact with actors, agencies and conditions 'on the ground'.

Data constitute a very important technology, as data make comparison possible. In addition, the shift in governing is dependent on the belief (or perhaps the illusion) among those 'doing' governing that data make systems knowable and transparent. Data support and create new kinds of policy instruments that organise political relations through communication and information (Ozga et al. 2011). These policy technologies make policy borrowing and lending, the topic of this current volume, more important and more prevalent than they have been in the past. This volume not only locates policy borrowing and lending as a key topic in the *World Yearbook of Education's* continuing engagement with understanding, as well as tracking globalising change in education, but also presents new directions for enquiry into policy borrowing and lending, and offers a variety of perspectives on processes of borrowing and lending as governmental technologies.

We are fortunate, then, to be able to offer a volume on this key topic that is edited by acknowledged experts in the field, with contributions from a range of scholars working in both 'lending' and 'borrowing' contexts. We are also fortunate in the contribution made by Ryan Hathaway, Graduate Research Assistant at Teachers College, Columbia University, who has assisted with reference checking and with other editorial tasks. The editors have ensured that contributors organised their approaches to the topic under a number of analytical categories. First, we are encouraged to consider the range of agencies involved in policy transfer, with attention to the governing capacity exercised by these agencies, before turning to consideration of 'externalisation' as a way of explaining interventions in a range of contexts. We then turn to the issue of selective borrowing and local adaptation – thus offering a shift from top down perspectives on policy borrowing and lending. Finally, the volume engages with travelling policy and the idea of policyscapes, moving the agenda beyond the idea of policy entering national systems to engage with the possibility of emergent transnational/international social system interaction and change.

Given the richness of the material, and the centrality of the topic to understanding the problem of globalisation, we are confident that this volume will be of interest to a wide range of scholars, not only those working in education.

*Globalisation researchers* will make use of this volume in exploring whether or not there is an international convergence of national educational systems, provisions and practices as a result of transnational policy transfer, or transfer of 'best practices' and 'international standards'. In the globalisation literature, there is much talk about the emergence of international knowledge banks (OECD, World Bank, etc.) that seek to govern through global indicators that monitor national progress. Perspectives from policy borrowing/lending research – such as those in this volume – help to illuminate the fact that these knowledge banks not only describe and then prescribe 'best practice', they often start with the prescription and then, *a posteriori*, conduct an analysis of the local situation, implying that global solutions exist first and then local problems have to be found, invented or identified to suit these global solutions.

*Policy researchers* will find material here in their enquiries into whether the travelling reforms 'arrive' in identical form or whether it is necessary to differentiate between transfer at the rhetorical level (policy talk) and implementation where it may

become heavily indigenised and locally adapted. Scholars of *education politics* may also find common ground here in the analysis of policy borrowing/lending as a political, rather than a rational, act.

*Economics of education* scholars will find material here from which they may draw conclusions about transfer costs and benefits, especially where imported reform is sometimes adapted to the local realities to such a degree that there is little or no similarity with the 'original'.

*Sociologists of education* will find material on the extent to which the act of externalisation may disempower some interest groups or policy coalitions at the expense of others and how reference to 'globalisation' or 'international standards' serves as a stamp of approval for a particular group's agenda.

Finally, *historians of education* may respond to this volume by considering the extent to which neither policy transfer nor harmonisation are new phenomena. Regional adaptation or harmonisation was a major feature agenda of colonial education policy.

We commend this volume to scholars from all of these fields of enquiry.

Jenny Ozga, Oxford

Terri Seddon, Melbourne

Gita Steiner-Khamsi, New York

Agnès van Zanten, Paris

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# Introduction

# 1 Understanding Policy Borrowing and Lending

## Building Comparative Policy Studies

*Gita Steiner-Khamsi*

This book deals, in a broad sense, with globalisation in education. More narrowly, it provides critical analyses of 'travelling reforms', that is, reforms that surface in different parts of the world. Globalisation is commonly viewed as an act of deterritorialisation. By implication, globalisation studies investigate the transnational flow of money, communication, beliefs, or, as is the case with comparative educational research, the travel of educational reforms from one cultural context to another.

Is the global circulation of reforms good or bad? The opinions on whether the transnational flow of reforms should be a cause for concern, or for celebration, are deeply divided. Some authors fear that we are abandoning our idiosyncratic conceptions of 'good education', and are gradually converging toward an 'international model of education'. They interpret the proliferation of policy borrowing and lending as proof that global players not only record and monitor national developments, but also impose their own portfolio of 'best practices' on governments. At the other end of the spectrum are authors who applaud travelling reforms, because they supposedly represent 'best practices', or 'international standards', that have been transferred successfully from one country to another. These analysts regard policy planning as a rational undertaking, and view policy transfer as proof of lesson-drawing, and thus one of the more desirable outcomes of evidence-based policy planning. No doubt, the discussion on policy borrowing and lending research is saturated with strong opinions. However, the authors of this book move beyond simplistic normative judgments (good or bad questions), to describe, analyse, and understand policy borrowing and lending in an era of globalisation.

### Linkages between Comparative Education and Policy Studies

The contributions which follow are intended to advance comparative policy studies. The preoccupation with travelling reforms has, perhaps more than other research topics, helped to illustrate the substance of, and justify the need for, comparative studies. Methodologically, any cross-national investigation of reforms is, by default, comparative. Nested in the intersection of two large and ever-growing academic fields – comparative education and policy studies – the study of travelling reforms draws on both research traditions. These two research traditions are interdisciplinary in orientation, and typically attract scholars in comparative political science and comparative sociology, who have invigorated research on globalisation and policy transfer.

At the same time, there is a significant gap separating comparative education from policy studies. Two distinct features of each field are particularly relevant for our research topic: while comparative education is transnational in orientation, policy studies is transsectoral. In other words, the focus on understanding local policy contexts against the backdrop of larger transnational or global developments should be considered a prominent feature of comparative education.

Openness towards debates in other policy sectors (social policy, environmental policy, etc.), as well as in the profit and non-profit/non-governmental sectors, is an important characteristic of researchers affiliated with policy studies. An intellectual cross-fertilisation is very much needed. Interaction between the two fields is mutually beneficial, and helps to compensate for some of the conceptual shortcomings of research traditions in each. One positive result would be for debates in comparative education to become more open towards theories concerning the policy process. These theories typically draw from numerous sectors, and are neither confined to government-issued policies, nor restricted to the education sector alone. In turn, there is also much to be gained for policy studies, because the comparative perspective challenges the nationalist – at times parochial – outlook that policy analysts tend to display.

The pace with which reforms currently circumnavigate the globe is truly astounding. Unsurprisingly, there is heightened interest in understanding why, and how, policy makers draw inspiration from a limited number of knowledge banks – OECD, IEA, the World Bank, and UNESCO – in particular. The resemblance between reforms across all levels of the system, and all aspects of education policy, is striking. Across a wide variety of nations and despite vastly different levels of social, political, and economic development, one finds talk of per-capita financing in schools, quality assurance in higher education, lifelong learning, and student-centred teaching (to name just a few), at all levels of the education system. From Ulaanbaatar to Berlin, from Anchorage to Cape Town, the similarities have grown to the extent that policy makers unscrupulously refer to these reforms as ‘best practices’, or ‘international standards’, in education, *as if* there existed a clearly defined set of standards, policies, and practices that are universally shared. Nevertheless, *imagined globalisation* in education has affected agenda-setting as significantly as the *real* pressure to harmonise or align the education systems with systems in the same region, or in the same ‘educational space’ (Nóvoa and Lawn 2002).

#### A Commitment to Understanding Local Policy Context

Naturally, the group of authors presented in this book shares more than merely a joint interest in comparative policy studies. They also have in common a similar interpretive framework and method of inquiry, that enables them to draw attention to the local meaning, adaptation, and recontextualisation of reforms that had been transferred or imported. They have systematically adopted a lens that lends explanatory power to *local policy contexts*, and makes it feasible to explore the contextual reasons for why reforms, best practices, or international standards, were adopted. For these authors, reforms from elsewhere are not necessarily borrowed for rational reasons, but for political or economic ones. Such an interpretive framework categorically

refutes the commonsense, yet naïve, assertion that reforms are imported because they have proven to be good or – even worse – because they represent best practices.

Emphasis on local policy context as the analytical unit for examining policy transfer places greater weight on the agency, process, impact, and timing, of policy borrowing. Very often, an investigation into policy borrowing and lending is triggered by a phenomenon that initially appears to be irrational or contradictory. These inconsistencies end up making sense once we apply an interpretive framework that pays attention to the ‘socio-logic’ (Schriewer and Martinez 2004) of cross-national policy attraction, or acknowledges the political and economic rationale for policy borrowing. The terrain under scrutiny should be the local policy context. It is this context that provides the clues for understanding why a borrowed reform resonates, what policy issue it pretends to resolve, and which policy actors it managed to mobilise in support of reform.

The interpretive framework used by many of the authors in this book relates to the political, as well as economic, dimensions of policy transfer (see Steiner-Khamsi 2010). Politically, borrowing often has a salutary effect on protracted policy conflict, because it builds coalitions. It enables opposed advocacy groups to combine resources to support a third, supposedly more neutral, policy option borrowed from elsewhere. ‘International standards’ have become an increasingly common point of reference in such decisions.

Economically, policy borrowing is often a transient phenomenon, because it only exists as long as external funding – contingent upon the import of a particular reform package – continues. Policy borrowing in poor countries is to the education sector what structural adjustment, poverty alleviation, and good governance, are to the public sector at large: a condition for receiving aid. As a requirement for receiving grants or loans at the programmatic level, policy borrowing in developing countries is coercive, and unidirectional. Reforms are transferred from the global North/West to the global South/East.

Interest in exploring the political, *and* economic, reasons for policy borrowing and lending is relatively new. For a long time, policy-transfer researchers focused on the politics of policy borrowing mainly because they were concerned with transatlantic transfer (United States and Europe), transpacific transfer (Asia and North America), or intercontinental transfer. The economic gains that drive policy borrowing and policy lending were ignored. Clearly it is time to study both, and pay attention to policy transfer within, *and* between, both world-systems: the wealthy, and the impoverished.

From a historical perspective, however, one needs to acknowledge that policy transfer between the two world-systems is not new. In fact, it constituted one of the key research areas for scholars immersed in the study of colonial education. One example is the study of ‘adapted education’ in early twentieth-century British colonial education policy. This model was disseminated to over thirty former British colonies and dependent territories (Steiner-Khamsi and Quist 2000). Interest in understanding the lending or export of policies, and the economic gains associated with disseminating, exporting, or lending ‘best practices’ and ‘international standards’ is, upon closer examination, a revitalised, rather than novel, area of colonial education research. Nowadays, those scholars in policy transfer research who live or work in

developing countries, and who have adopted a postcolonial or post-developmental research paradigm, hold a keen interest in understanding the political, as well as the economic, dimension of imported reforms.

### Something Borrowed, Something Learned?

Twenty years ago, policy exchange between the United Kingdom and the United States peaked, with the busy transfer of neoliberal reforms between the two countries (see Whitty, in this volume). The transfer was well documented, and led one group of researchers to wonder whether anything was learned from the proliferation of choice, standards-based, and quasi-market reforms (Finegold et al. 1993). It may be an opportune moment to reflect, two decades later, on the meaning of policy learning, and its relation to policy borrowing.

The authors that have been assembled for this volume have chosen the term 'policy borrowing and lending' deliberately, so as to situate their work within the broader field of comparative policy studies. In contrast to related terms such as 'policy learning' and 'policy transfer' (produced in political science), or 'diffusion' or 'reception' (generated in sociology, social anthropology, and history), the term policy borrowing and lending emerged in the field of comparative education, and underwent a revival of noticeable magnitude in the past decade. This new interest was the outcome of debate on how global governance affects national educational systems, beliefs, and practices, and was fuelled by the controversy over whether the international convergence of educational systems should be interpreted as a direct result of cross-national lesson-drawing, or other, more coercive, forms of policy transfer. Arguably, new policy instruments such as the adoption of 'best practices', or the alignment of national educational systems with 'international standards', could be viewed as transnational policy transfer, and thus add credence to what David Dolowitz and David Marsh prescribed ten years ago (Dolowitz and Marsh 2000: 14): 'When we are analysing policy change we always need to ask the question: is policy transfer involved?' Authors in comparative education have studied different types of transfer, ranging from voluntary transfer (lesson-drawing, emulation), to coercive transfer (harmonisation, imposition). As mentioned above, scholars have traditionally directed their attention to the study of travelling reforms. It is with good reason that comparative education has been traditionally enamoured with the study of reforms that travel from one country to another. One must be familiar with two or more educational systems to notice that the same reforms pop up again and again in different parts of the world. Above all, one needs to compare.

Today, scholars in comparative education investigate the international dimension that surfaces at various stages of the policy cycle, starting from the stage of problem definition and agenda setting, to policy implementation and evaluation. It has been noted, for example, that the pre-existence of global reform packages disseminated, and sometimes funded, by global actors such as the OECD, the World Bank or the regional development banks, suggests a sequence that is at odds with what is typically assumed in policy planning: local problems are sometimes *created* in line with packaged global solutions, rather than the other way around. Another recent phenomenon that has drawn considerable attention is the proliferation of

international knowledge banks containing statistics on national educational systems. Set up by global actors to monitor national progress, these banks promote evidence-based or knowledge-based regulation as a tool to justify the adoption of global reforms.

The educational focus notwithstanding, we find the scholarship produced in public policy (e.g. Sabatier 2007) and comparative social science – particularly comparative political science, sociology, and history – extremely useful for the study of travelling education reforms. In comparative political science, for example, the term 'policy learning' is closely associated with the seminal work of Peter A. Hall (1993), and has been expanded over the past few years to include a fascinating, and interdisciplinary, array of analytical work that deals with the actors, processes, and effects of policy change. Hall frames policy change as social learning, i.e. a 'deliberate attempt to adjust the goals or techniques of policy in response to past experience and new information. Learning is indicated when policy changes as the result of such a process' (Hall 1993: 278).

Hall distinguishes between first-, second- and third-order changes. Incremental or first-order changes represent the most common type of policy learning. The instruments and goals of the policy are preserved, but the policy is pursued with greater vigour, efficiency, and effectiveness. In second-order changes, the policy instruments are altered, but the policy goals are maintained. Finally, third-order changes signal radical or fundamental policy alterations. Comparable to Kuhnian 'paradigm shifts', these third-order changes often result from policy failure and, as a consequence, replace not only the instruments, but also the goals of policy making with new ones. Indicative of second- and third-order changes is the broad range of actors and organisations involved in the social learning process. Known for his analyses of neoliberal thought in the 1980s and 1990s, Hall identified the change in economic policy under British Prime Minister Margaret Thatcher as a third-order change, because the Keynesian mode of policy making was completely revamped, and replaced with a new monetarist approach.

In another early piece on policy learning and change, Colin J. Bennett and Michael Howlett (1992: 275) distinguished between actors, content, and effects of policy learning, and turned their attention to 'who learns, what they learn, and the effects of learning on subsequent policies'. Unsurprisingly, incremental policy learning, considered the standard mode of policy change, does not attract great professional interest or academic scrutiny. On the contrary, most studies on the policy process focus on second- and third-order social learning.

In the same vein, research on policy borrowing and lending focuses on second-order and third-order policy change. More recent literature on policy studies, comparative education, and political science, features the terms 'transfer', or 'policy borrowing and lending', to neutralise the positive connotations associated with 'policy learning'. This work also constitutes an attempt to examine the transsectoral or transnational dimensions involved in transfer processes. As with diffusion studies, research on policy borrowing and lending investigates how policies from one domain or one sub-system (education sector, health sector, economic sector, etc.) are transferred to another, or how they are transplanted from one system or country to another.

This particular area of policy research gained prominence in the context of globalisation studies, and studies on the international convergence of national education systems. Many important research questions arise when a policy borrowing and lending lens is utilised. Such questions include: why is a policy borrowed from another policy domain or system, when a similar reform has already been tested? Why is policy borrowing more likely to occur after political changes, or after changes in administration? Which educational systems tend to be objects of emulation, i.e. serve as reference systems or 'reference societies'? Why are policies transferred that failed in the initial context? Why do emulation and lesson-drawing have a salutary effect on protracted policy conflict? As mentioned previously, the emphasis in this interpretive framework is on local policy context. This framework has also been applied to investigations of the economic reasons politicians and policy makers in developing countries are led to import reforms from the global North or the global West.

Obviously, there is no single term that could adequately contain all of the nuances embedded in a set of concepts as diverse as policy learning, policy change, policy transfer, or policy borrowing and lending. Of all the terms available, we found 'policy borrowing and lending' to be the most appropriate for the following reasons: it is a term that is widely used in comparative education research, includes a notion of agency, is neutral with regard to the purpose and outcome of the policy transfer, and accounts for a focus on the receivers, as well as the senders, in the policy-transfer process. The term also avoids some of the interpretive pitfalls attached to the term policy 'learning', which in educational research, in particular, may carry excessively positive associations about the reasons or purposes of policy transfer.

### New Scholarship, New Avenues of Inquiry

The study of cross-national policy borrowing and lending is accompanied by lively intellectual debates. As with all theories, the concepts used in this field have been adjusted, refined, and expanded, over time. Policy borrowing and lending – both as an act (normative aspect), and as an object of study (analytical aspect) – has a long-standing tradition in comparative education. However, it has only gained popularity among social researchers and policy analysts within the past twenty or thirty years. One can find the contributions of three generations of scholars who helped to boost, and sustain, interest in policy-transfer research.

The first generation of scholars introduced fundamental concepts. These include selective policy borrowing and lending (Brian Holmes), externalisation (Bernd Zymek, Jürgen Schriewer), or cross-national policy attraction (David Phillips). These ideas laid the foundation for a particular research paradigm that pays great attention to local policy contexts as the main site for understanding policy transfer.

Building on the new research paradigm that used local policy context as the primary site for analysis, my generation of researchers adapted several concepts, and refined them in ways to make them applicable to the study of travelling reforms. For example, each of the co-editors of the *World Yearbook of Education* examined governance by numbers (Jenny Ozga), travelling pedagogies (Terri Seddon), or the growing influence of non-state actors and backstage advisors in post-bureaucratic states (Agnès van Zanten). The work of Joseph Tobin, Yeh Hsueh and Mayumi Karasawa (2009), and

Kathryn Anderson-Levitt (2003) – anthropologists with a genuine interest in understanding the local meaning attached to imported reforms – has also been influential in comparative policy studies. Several authors in this book – Linda Chisholm, Roger Dale, Philippe Gonon, Christian Maroy, Ka Ho Mok, Susan L. Robertson, Geoff Whitty – are renowned representatives of the second generation. Since the 1990s they have opened up new research areas and introduced new concepts, such as, for example, the study of regional harmonisation of educational policy (Chisholm), methodological nationalism (Dale and Robertson), or policy tourism (Whitty), to list just a few of their accomplishments.

At the same time, these second-generation researchers have expanded the geographic radius to include developing countries, where grants and loans are often tied to the import of specific programmes or reforms. As a result of this conceptual and geographic recalibration we supported, at my home institution, Teachers College, Columbia University, numerous empirical studies and dissertations exploring the politics and economics of policy transfer (see Steiner-Khamsi 2010). The commitment to exploring the agencies, reasons, and impacts of travelling reforms, made it necessary to expand our horizon, and draw on additional theories in the field of policy studies. This conceptual expansion made us recognise that the reliance of policy makers on 'best practices', or 'international standards', is often a political manoeuvre to help build political or economic alliances in support of contested reform agendas. In short, globalisation is not an external force, but rather a domestically induced rhetoric mobilised at particular moments of protracted policy conflict, to generate reform pressure and build policy advocacy coalitions.

Research on policy borrowing and lending grew exponentially over the past decade, producing an abundance of valuable studies. It would have been impossible to include all the third-generation authors who have either introduced new cutting-edge themes, propelled new perspectives, or advanced new interpretations of old topics. This book is only able to present a small selection of promising new research that surfaced in the new millennium. This third generation of scholars in policy-transfer research will set the research agenda in comparative policy studies in the years to come, and is therefore worth discussing in greater detail. I will confine my remarks to four promising research areas that are likely to attract academic curiosity and professional interest in the future:

- the shift from bilateral to international reference frames
- understanding the logic of systems and cases
- methodological repercussions of 'policyscapes'
- deciphering projections in cross-national policy attraction.

### The Shift from Bilateral to International Reference Frames

It is noticeable that policy makers increasingly refer to 'international standards', rather than to concrete lessons learned from a particular educational system, when they make their case for policy transfer. The bilateral framework has clearly been broken up into a diverse set of ideas subsumed under the vague label, 'international standards'. This phenomenon has produced four compelling new strands of research on the

lifespan of a policy, network analysis as a methodological tool to analyse agency, harmonisation and coercive transfer, and policyscapes.

### *The Process of Gradual Deterritorialisation over the Lifespan of a Policy*

The proliferation of international, rather than bilateral, references may be interpreted as a sign that certain reforms that were disseminated across the globe are now maturing, and eventually will be replaced. The epidemiological model identified three phases of a so-called 'reform epidemic': slow growth, explosive growth, and burnout (Watts 2003). Today we are surrounded by 'well-travelled' reforms: the quasi-market, neoliberal, or hyper-liberal reforms, launched during the Thatcher–Reagan era. These were borrowed by New Zealand and Australia, and then disseminated to other parts of the world. Precisely because they were introduced so long ago, policy makers in late-adopter countries refer to them as international reforms, without considering where they originated. The transformation of a policy over time is succinctly summarised in Robert Cowen's brilliant phrase 'as it moves, it morphs' (Cowen 2009).

A well-documented example of a policy that continued moving and morphing, or gradually became deterritorialised, is the conditional cash transfer (CCT) programme. In this book Morais de Sá e Silva focuses her investigation of conditional cash transfer programmes, which provide incentives to children from poor families to enrol and/or complete school, on three countries – Brazil, Colombia, and the United States. The conditional cash transfer programme is ideal for consideration as a reform package that went global, because it was transferred to over forty countries within the past fifteen years. It resonated for different reasons in various countries, and the design of the programme differed considerably depending upon which version, or at which stage, policy makers borrowed it.

### *Network Analysis and the Quest for Identifying Agency*

Another strand of cutting-edge research that contributes to refining transfer research builds methodologically on social network analysis. Different from diffusion research, which tends to downplay the agency involved in disseminating innovations or reforms, network analysts developed methodological tools to identify actors of transfer. In this book, for example, Barbara Schulte places agency at the centre, enabling her to identify individuals, associations, and institutions that were key disseminators of vocational education reforms in PR China. Her sophisticated methodology uses the variables closeness, betweenness, and connectivity, within the network of the Chinese Association of Vocational Education (CAVE), to understand why local actors were able to draw on CAVE as a quasi-external, credible source of authority for building vocational education. Her method of inquiry allows her to understand why, and how, concepts of vocational education in China were strongly influenced by the network of CAVE members.

Schulte's chapter is important for scholars of policy-transfer research who subscribe to case study methodology as their preferred method of inquiry. Case-study methodology, if applied rigorously, provides access to the inner workings of a case, a system, a country, or an institution. For many of us, it is thorough analysis of the local context

that matters most in understanding the agency, rationale, and impact, of policy transfer. Rather than viewing policy makers as helpless recipients of global standards, reforms, and trends, this group of authors acknowledges (active) agency as reflected, among other examples, in selective borrowing and local adaptation.

### *Harmonisation: A Special Type of Coercive Policy Transfer?*

Given the replacement of the bilateral framework with loosely defined international references as the primary form of externalisation, the usefulness of the dichotomies borrowing/lending, reception/diffusion, and import/export, has been called into question. Several authors propose using other terms that are less specific with regard to spatial mobility. One approach to resolving the lack of explicit reference to a particular education system, or reference society, is to acknowledge the existence of a 'referential web' (Vavrus 2004). Another approach is to recognise the blurred trajectories, and label transplanted educational reforms simply as 'travelling policies' (Seddon 2005; Coulby et al. 2006). In this sense, all global educational reforms qualify as travelling policies: one does not know where they come from, or go to; they are at the same time nobody's and everybody's reform. The suspension of the bilateral frame of reference does, however, have larger repercussions for the debate in comparative policy studies.

For borrowing researchers of the first generation, it was vital to interpret the choice of 'reference society', that is, the educational system from where policies, practices and ideas were borrowed. Typically, there were cultural, political, or economic reasons that accounted for the borrower's interest in a particular system. David Phillips (2004), for example, examined the reasons for the cross-national policy attraction of British government officials and scholars towards the educational system in Germany, during the nineteenth century. The range of motivators for one country to seek inspiration from the educational system of another can be extremely diverse. In the United States affinity attracted reformers to the UK model in the early 1990s. However, US education policy makers have also been driven by competition (e.g. the Soviet Union in the late 1950s and early 1960s), or curiosity (e.g. Japan during the 1980s). Nowadays, the league leaders in international student achievement tests, such as Shanghai–China, Finland, or Singapore, receive the most attention.

Arguably, the preoccupation with understanding the choice of reference society has become somewhat obsolete. Studies today deal increasingly with the emergence of new regional and international educational spaces as a result of harmonisation. Examples include the Bologna and Lisbon Protocols in higher education, and the Education for All programmes in developing countries. Governments that sign such agreements must eventually align their policies with those of the larger 'educational space' they have chosen to inhabit.

Iveta Silova's dissertation research (see Silova 2005) examined the shift from the Soviet to the post-Soviet/European educational space, inhabited by Latvia in the 1990s. Using the fascinating case of bilingual education policy, she demonstrated how parallel, or separate, schooling was preserved, even as a multilingual reform was added to comply with the policies of the new European allies. From the perspective of policy-transfer research, harmonisation is only one of many variants of policy borrowing

and lending; one that, perhaps more visibly than with other variants, depicts the move away from bilateral, to a regional or international frame of reference.

Several authors in this book, notably Roger Dale and Susan L. Robertson, Sotiria Grek, and Anja P. Jakobi, reflect on harmonisation from a theory perspective. By design, international or regional agreements (Education for All Declaration, Bologna Protocol, Paris Declaration on Aid Effectiveness, etc.) are prescriptive and coercive. Therefore, these authors raise fundamental questions that greatly impact the larger field of comparative policy studies: what does harmonisation do to local policies and practices, and what mechanisms of power are invoked when pressure is exerted to align national structures and policies with a larger educational space? If we acknowledge that global governance is more than merely accrued national governance systems, extrapolated at the international level, we understand the urgency of understanding how transnational social movements, networks, and linkages (including public-private), have diminished state autonomy in agenda setting, policy formulation, and implementation.

### *Understanding the Logic of Systems and Cases*

Many authors in this book have chosen local policy context as the primary site for understanding policy borrowing and lending. A few explicitly link their framework with larger theories. For example, some of us find the theory of self-referential systems (closely associated with the work of Niklas Luhmann) suitable as a lens for analysing the inner workings of a system that precedes, accompanies, or results, from policy transfer. We have applied the theory as an interpretive framework to understand select systems regardless of whether the 'system' constitutes an educational system, a local education authority, a non-governmental organisation, an aid agency, or any other living entity that involves actors. We deliberately use the terms 'case' and 'system' interchangeably, because methodologically a case is a bounded system with its own 'causal web' (Tilly 1997) that connects the large number of variables in the case/system. The synonym, however, only makes sense if case study methodology is carried out rigorously, that is, if the emphasis is placed upon examining the causal web, and the interrelations within one and the same case or bounded system.

A few examples may help illustrate the features of this particular approach to deciphering the logic, or inner workings, of a system or case. In a landmark study on educational knowledge, Schriewer and Martinez (2004) examined flagship educational research journals in three countries: Spain, Russia/Soviet Union, and PR China. They noticed considerable fluctuation with regard to space allocated to international scholarship, as measured in the number and type of foreign bibliographical references made in the journal articles, of the three respective countries. Schriewer and Martinez found that 'socio-logic' (particularly political developments in a given country) was a better predictor of receptiveness towards international scholarship, than an external logic as manifested in the ever-expanding transnational network of educational researchers.

In fact, the era of greatest convergence with regard to educational knowledge was in the 1920s and 1930s, when educational researchers in Spain, the Soviet Union, and China were drawn to the work of John Dewey. Once that brief period was over, Dewey

was dropped from the reference list in Soviet educational journals, and replaced by Nadezhda Krupskaya (Lenin's wife). It is striking that against all expectations of international convergence theorists, educational knowledge in the three countries did not become more internationalised after the mid-1980s, when all three opened their ideological boundaries, and increased international cooperation. Even though Schriewer and Martinez's (2004) justification for the case selection leans on a problematic notion of culture and 'civilisation', the design and methodology of the study is compelling and well-suited for analysing international convergence/divergence processes.

Similarly, we drew on the theory of self-referential systems in *How NGOs React*, to analyse the logic of the Soros Foundation Network (Silova and Steiner-Khamsi 2008). We compared the Soros Foundation Network – a combination of donor agency and implementation agency – with other donors operating in the post-socialist region. We found that donor logic was instrumental for shaping the programmatic priorities, implementation modalities, as well as the exit strategies that various organisations pursued in the region. Donor logic also provided clues for understanding how organisations define aid effectiveness, sustainability, and other key concepts in development work. Our study of the Soros Foundation Network was meant to contribute to the larger body of scholarship analysing bilateral and multilateral external assistance, against the backdrop of foreign-policy goals, economic gains, and other rationales for aid (e.g. Alesina and Dollar 2000; Riddell 2007). Examination of Soros Network Foundation's donor logic not only contributed to the larger field of donor logic research, but also showed how the theory of self-referential systems could be enlisted to do so.

Focus on 'socio-logic' (Schriewer and Martinez 2004), or on 'donor logic' (Silova and Steiner-Khamsi 2008), represent just two examples of how the causal web of a bounded system, or case, may be explored. A third type of research that attempts to distil the inner workings of a network focuses on processes of 'translation' that occur when a reform from elsewhere is selectively borrowed, recontextualised, and then implemented, in a new system. In fact, it is accurate to state that the great bulk of policy borrowing and lending research consists of studies on reception, translation, and selective policy borrowing. These are carried out with the intention of understanding the logic of a particular local institution: the educational system of the country under study.

The work on socio-logic, donor logic, or institutional logic, illuminates three research areas in which system theory has much to offer. I see the contours of a fourth nascent field of research: the investigation of 'sector logic', particularly a comparison between the logic of the educational sector, versus the logic of the economic sector. There is nothing exciting about revisiting the discussion on how economic thinking crept into the educational discourse, but it would be novel to examine in greater detail how economic thinking was recontextualised, and adapted, to suit an educational logic as a result of policy transfer. Arguably, the turn of the century saw no scarcity of research literature pointing out the contradictions of market-oriented educational reform when applied to the education sector. It is noticeable that as educational researchers we find it easier to ponder the rationality/irrationality principles of others than our own. The dissection of one's own educational logic is a topic that is likely

too close for comfort. Even though educational researchers are masters at defining the key principles, or the 'logic', of the economy (e.g. supply/demand, profit, competition, accountability, etc.), we have shied away from elaborating on the educational logic that is genuine to the education sector.

The new generation of policy borrowing and lending researchers, however, is expected to produce groundbreaking work in this area. For example, the study of transsectoral policy transfer between the economic and the educational sectors in Sweden, produced by Florian Waldow (2007), is a start in this promising new direction. From a system theory perspective, the following research questions are currently understudied: how are policies that are borrowed from other sectors or subsystems (e.g. economy, health sector, church, family) translated, re-interpreted and modified, in the education sector or subsystem? To what extent does this act of translation reflect an 'educational logic'? How does the educational system deal with incongruences, contradictions, and inconsistencies in the subsystem that arise when the transferred policy could not sufficiently be translated or re-contextualised to suit the logic of the educational system? For us, these incongruences, contradictions, and inconsistencies are not merely 'loose coupling', or some kind of unpleasant 'noise' that is best ignored. On the contrary, they provide important clues for understanding the idiosyncrasies of a system, case, or an institution, including the education sector.

### Methodological Repercussions of 'Policyscapes'

One section of this book is dedicated to the study of travelling reforms or, in a more comprehensive manner, the study of policyscapes. It would be wrong to assume that these two terms – travelling reforms and policyscapes – should be used interchangeably. The latter evokes a 'globalisation optique', and calls for a critical reflection on national educational systems as a unit of analysis. I will reiterate here what I have presented earlier in terms of the innovativeness of the 'policyscapes' as presented by Stephen Carney in his award-winning article, published in 2009 (Carney 2009; see Steiner-Khamsi 2010).

Carney's coinage of the term 'policyscapes' advanced ongoing debates over contextual comparison and case study methodology. How is the case significant? What does it represent? These questions not only provoke unease among qualitative researchers, they are the Achilles' heel of the single country study. Carney's work accounts for many vulnerabilities in the comparative case study method. Most notable are the central questions of what a case stands for, and the fate of nation-state analysis in an era of globalisation.

In his study of educational reforms and practices in Denmark (5 million residents), Nepal (26 million residents), and China (1.3 billion residents), Carney combines vertical with horizontal comparison. The former involves different levels, sites, and actors *within* a country/case, while the latter addresses issues *across* the three countries/cases. Several interpretive frameworks inform his method, notably Arjun Appadurai's notion of flows (Appadurai 1996), as well as James Ferguson's idea of state spatiality encompassing horizontal (across states), and vertical (within nation-states), dimensions (Ferguson 2006). Carney extracts elements from each to coin the

term 'policyscapes', denoting how the transnational flow of hyperliberal policies permeates every level, transforms every aspect, and affects each actor, in an educational system.

Precisely because globalisation is ubiquitous, every case enables us to understand the transnational character of educational policies and practices. Any site, level of analysis, or actor within a given case(s), qualifies for comparison. As a corollary, Carney compares three different countries, three different levels (higher education, general education, non-university-based teacher education), and two different areas of reform (governance and management systems, curriculum reform). By comparing different cases, levels, and areas, he stretches the conventional rules of cross-national comparison. The two key questions in contextual comparison – case selection (what do the selected cases stand for?), and comparability (can they be compared?) – are addressed convincingly. The *tertium comparationis* between the three cases – Denmark, Nepal, China – is the transnational dimension, the policyscape. Policyscapes, suggestions regarding multi-level analysis (Mark Bray), vertical case studies (Frances Vavrus and Lesley Bartlett), or video-cued multivocal ethnography (Joseph Tobin), are all methods of inquiry that help us overcome the methodological nationalism implied in many comparative studies, particularly those that deal with cross-national comparison.

### Deciphering Projections in Cross-National Policy Attraction

I started out this chapter by highlighting the methodological approach that most authors of this book have in common: we believe that policy borrowing and lending has more to do with what is occurring in the local policy context, than with best practices, or effective policies, that await transfer from somewhere else. Over the past few years, scholars have started to analyse the reception of TIMSS, or PISA, in national media accounts, and also examined the second-guessing and lively public debate over what system variables in a given country's educational system accounted for students' outstanding test results. Arguably, the educational systems of Singapore and Finland (league leaders in TIMSS and PISA, respectively), have received so many accolades for their teacher education systems, that policy makers from Ohio to Japan to Germany project features into these two systems that have nothing to do with reality (Takayama 2010, Waldow 2010).

With this in mind, Florian Waldow and Keita Takayama (both in this book), use a culturalist approach to take study of policy transfer a step further, and examine (national) projections into another country's educational system. Takayama's recent study on how policy makers in Japan reframed policy talk to emulate, at least rhetorically, the 'Finish PISA success', has attracted great attention among comparative education scholars. Similarly, Florian Waldow analysed the reasons for cross-national policy attraction in Germany. He introduced the term 'projections' to denote the (German) socio-logic that shaped the distorted, simplified, and at times contradictory, presentation of the Finnish school system in the media. In the cases of Japan and Germany, policy makers reframed, or 'Finnlandised', ongoing debates in their country, that had little to do with why Finnish students performed exceptionally well in the PISA studies.

As with other researchers that focus on local policy context, Waldow and Takayama use the study of policy projections as a methodological tool for identifying protracted policy conflict in a national context. A forthcoming generation of scholars – perhaps the fourth generation of policy borrowing and lending researchers – will turn their attention to analysing how national policy agendas are projected into so-called ‘international standards’. Indeed, it is striking that international standards are defined differently depending on the country, case, or system in which they are employed.

Traditionally, the *World Yearbook of Education* has been closely associated with comparative education research. It bodes well for the future of comparative policy studies that two recognised policy borrowing and lending researchers, Carney and Takayama, were awarded the George Bereday Award for best article in the journal *Comparative Education Research* in two subsequent years, 2010 and 2011 (Carney 2009; Takayama 2010). There seems to be a shared understanding that travelling reforms, a long-standing research area of comparative education, has visibly expanded its target audience over the past few years. No doubt, the study of policy borrowing and lending has generated a heightened interest in the broader educational research and policy studies communities. The fascination with the topic is likely to grow further, given the promising new avenues of research that contributors to this book have proposed.

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