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CHAPTER 9

THE RECONTEXTUALISATION OF GLOBAL EDUCATION REFORMS: INSIGHTS FROM THE CASE STUDIES

Hülya Kosar Altinyelken and Antoni Verger

This volume is primarily concerned with the emergence of global education reforms of a managerial nature (GMERs), their recontextualisation in particular contexts and their relationship to teachers. Within the field of comparative education, there is much focus on how policy “transfer” or “travelling” occurs and on the content of education policies that have acquired a “global” status. Empirical studies that examine the complete policy process of the global reforms, from its adoption, re-contextualisation and implementation are, however, scarce. This book aims at contributing to our understanding about these key issues and processes, in particular by seeking to examine the interrelationship between GMERs and teachers. In this concluding chapter, the seven country cases outlined herein are discussed from a comparative perspective, in order to recapture their main findings and discuss policy implications.

The case studies include reforms aimed at introducing teacher evaluation (Peru) and teacher accountability measures (Indonesia and Jamaica), competency-based curriculum (Turkey), public private partnerships (Uganda), decentralisation (Namibia) and contract teachers (India). These policies were adopted within the past decade, except for decentralisation reforms in Namibia and contract teachers in India which were introduced in the 1990s. At the time of data collection, the reforms were at different stages: Some were at policy formulation stage and, therefore, had not been piloted or fully implemented yet (Indonesia and Jamaica); one was in piloting and early implementation phase (Peru); and the others had already been implemented for some years (Turkey, Namibia, India and Uganda). In each case study, teachers or school principals are considered as central actors in the analysis. However, reform processes are also discussed with and from the perspectives of other educational stakeholders, including policy makers, consultants, international donors, and NGOs. The analysis in this concluding chapter focuses on four main dimensions: the rationale for the adoption of the “global” policies, teacher responses, recontextualisation at the local level, and the impact of the reforms on teachers’ work. Finally, the policy implications of the main findings will be discussed and key suggestions offered.

RATIONALE

The GMERs analysed mainly focus on primary education and seek to improve education quality, except for the case of PPP in Uganda which is introduced at secondary education level and aims at expanding access to education as well as improving the quality of

education. In all the chapters in this volume, it is seen how reform discourses make frequent references to concepts and values such as globalisation, knowledge economy, economic development, growth, competitiveness, education quality, efficiency, (cost-) effectiveness and accountability to justify their adoption. There is also reference to equity concerns in some contexts, such as in Turkey and Uganda. However, an overall analysis of the cases reveals the primacy of economic considerations for the undertaking the reforms. Improving education quality is directly linked to enhancing the capacity of education systems to better contribute to economic development and competitiveness in a global economy. Furthermore, teacher evaluation, accountability or decentralisation policies appear to be envisaged as cost-effective measures to improve the efficiency of the education system.

In Indonesia, for instance, increasing global competitiveness and the productivity of the Indonesian economy was perceived by some actors as the main driving force behind the education reforms. In Turkey, the curriculum documents make frequent references to national economic development and competitiveness in international markets. The need for curriculum reform was legitimised by highlighting the importance of knowledge as a production factor in contemporary societies. Similar statements were made in Jamaica as well, where policy makers use this economic argument to advocate reforms aimed at improving education quality. The prevalence of economic rationales behind the GMERs analysed reflect a worldwide trend in education politics. In fact, since the 1980s, “The need for change in education is largely cast in economic terms and particularly in relation to the preparation of a workforce and competition with other countries” (Levin, 1998, p. 131-132).

Political discourses are grounded on a multitude of implicit and explicit sets of *assumptions* made by policy makers as they attempt to rationalise the reforms in their respective countries. For instance, in Peru, the policy makers assume that, by evaluating teachers through standardised tests and providing incentives according to the results, they can improve teacher motivation and the quality of teaching. Likewise, accountability measures targeting teachers in Jamaica and Indonesia or the school clusters approach to decentralisation in Namibia assume that such interventions would contribute to improved efficiency of the system and enhance education quality. Furthermore, in Uganda, partnering with “for profit” private schools is viewed as a solution to increase education access and improve quality. Likewise, in India, the wide-scale appointment of contract teachers was not only seen as an effective tool to improve access to education and reduce high pupil-teacher ratios, but also as a means of addressing high teacher absenteeism and ensuring teachers’ accountable to performance.

The traditional approaches to educational-policy transfer assume that countries borrow educational policies elsewhere because they are considered *successful* in reaching certain objectives. However, several chapters in this book review a range of literature that contradicts this reform optimism, and conclude that many GMERs are far from “successful” in many locations around the world. Even the most ardent advocates of PPPs admit that evidence on the positive outcomes of partnerships at a larger scale is not conclusive yet (Patrinos *et al.*, 2009). The same applies to teacher evaluation and accountability as well as to decentralisation policies whose effects on teacher motivation and overall education quality are inconclusive, mixed or negative (Day, 2002; Edwards, forthcoming).

What then explains the educational-policy transfer in these case studies? Why do the countries reviewed appear to engage in a similar global reform discourse? According to Meyer and Ramirez (2000), countries adopt a global culture of schooling because a set of ideas and educational practices are perceived as modern, although they may not actually be the best way to manage schools. In other words, countries adopt policies or educational programmes not because they are truly better or successful, but because policy makers perceive them as such. This might partly explain the enchantment of policy makers with specific education policies. However, the cases analysed strongly point to economic and political imperatives involved in education policy transfer. Steiner-Khamsi (2010) suggests that the '*politics*' and '*economics*' of educational borrowing and lending are highly relevant for discussions on why and how countries adopt certain educational policies. The political aspects refer to the motives of international actors (e.g. donor agencies, NGOs or consultants) for exporting and disseminating specific education policies, as well as political motives at local level for adopting a set of education reforms. The economic aspects of policy borrowing and lending refers to economic reasons for borrowing educational reforms, which is particularly salient for the low-income countries that constitute the majority of case studies contained herein. This is clearly linked to what Roger Dale (1999) calls 'imposition', a policy mechanism through which external actors compel some countries to take on particular education policies. For instance, imposition is activated when development banks lend money to low-income countries with the conditions that specific reform packages or, at least, specific policy components should be adopted by them. Or, low-income countries adopt specific education policies at a time when funds from development banks or other donors are made available for implementing them. The politics and economics of policy lending and borrowing help to explain why educational reforms in low-income countries look increasingly similar to those in Western societies. All the GMERs studied in this book, teacher evaluation, accountability, decentralisation and PPPs fall within this category.

The economics of educational-policy transfer is illustrated by many cases in this book. For instance, the large-scale reform efforts in Namibia were preceded with fiscal crisis and increasing donor dependency. In Indonesia, similar efforts to transform the education sector were initiated after the Asian financial crisis, which coincided with the increasing influence of the World Bank group in Indonesia, and the vulnerability of the country to prescriptions offered by these institutions (e.g. the Washington Consensus). Uganda is another country which is characterised by high levels of donor dependency. Although external donors tend to argue that education policies have been driven largely by the Ugandans themselves, this perception is not fully shared by their Ugandan partners (Higgins and Rwanyange, 2005). High dependence on donor aid, which accounts for more than 50 per cent of the Ministry budget, makes it very likely that the Ugandans conform to donor priorities and refrain from policies that would alienate the donor community. As one of the Ugandan respondents stated, policy makers chase money and adopt policies for which donor funding is available.

The Ugandan case not only illustrates the economics of borrowing but also the politics of it. In 2006, the Ugandan government announced the free Universal Secondary Education (USE) programme, and became the first sub-Saharan African country to adopt such a policy. The programme was motivated by increasing demand for secondary education, but more so because of President Museveni's aim to attract votes during the election campaign with

the promise of free secondary education. The policy was adopted with little attention to system capacity, organisational planning, financial resources, and without anticipating the consequences of a rapid expansion of secondary schooling. As Chapman *et al.* (2010, p.81) suggests, "USE is best understood as a symbolic and political decision of Government". To live up to this political pronouncement, and meet increasing demand for funds, the government approached the World Bank, which is known to promote PPP in various contexts. The case of Turkey also indicates some political considerations. Accession to the EU has a strong political influence in Turkey. Therefore, harmonisation of the Turkish education system with that of EU countries by adopting education policies that are prevalent in the continent, including competency-based curriculum, continues to be an important political initiative.

The discussion on the politics and economics of policy borrowing and lending closely relates to *the role of international donors* in educational policy transfer. In the case studies documented in this volume, national policy makers often reacted defensively when asked about the ownership of educational reforms. They claim that the reforms are nationally driven and developed by a rethinking of national imperatives and other contextual factors (e.g. Indonesia, Jamaica and Turkey). However, interviews often indicated significant involvement by international actors. The World Bank appears to be the most frequently involved and powerful donor in the case study countries, as it provided loans to finance the reforms and offered technical assistance in Indonesia, Jamaica and Uganda. In Indonesia, several international consultants took part in task forces and disseminated their experiences, knowledge and assumptions on so-called "international best practices". International organisations were viewed as highly influential in setting agendas, designing and disseminating concepts, theories, ideas and strategies. Furthermore, in Jamaica, the World Bank and USAID were highly influential in policy formulation as they shaped target setting and contributed to the selection of refinement of policy ideas. Moreover, in Uganda, the Bank introduced the idea of partnership with private schools as an "efficient" way of providing secondary education, and funded the reform by providing long-term loans.

Furthermore, other international actors were influential in promoting managerial reform processes in the cases explored in this volume. For instance, the EU played a significant role in Turkey by financing the curriculum review and influencing the review process to a certain extent. In Namibia, the school clusters approach to decentralisation was first initiated and funded by GTZ, the German Aid Agency, and was later taken over by USAID. The GTZ was viewed as the primary designer, supporter and funder behind the policy. This high-level presence of international donors in the case study countries confirms the importance of considering the role of international organisations in processes around educational policy transfer. As shown in these case studies, such organisations play an active role in reform processes by identifying problems to be solved (agenda setting); disseminating a set of ideas, norms and causal theories (e.g. human capital or rates of return analysis); imposing decisions, defining standards, setting benchmarks, and facilitating the harmonisation of education policies (Verger, 2012).

TEACHER RESPONSES

The GMERs analysed in this volume either target teachers (teacher evaluation, accountability and contract teachers) or directly involve them as the main actors in charge of reform

implementation (e.g. decentralisation and competency-based curriculum). Because of such a high level of involvement, teachers' responses to the reforms have been highly critical in ascertaining to what extent and how the reforms were enacted by them. In the case of reforms that were not yet implemented at the time of research (e.g. accountability reforms in Indonesia and Jamaica), teachers' views were highly influential in determining the likelihood of "successful" implementation. The typology of teacher responses to education reforms includes compliance, incorporation, mediation, retreatism and resistance. 'Incorporation' has been the most common response as teachers most often consolidate reforms selectively into their own educational practices (Pollard *et al.*, 1994). Reforms change schools and schools change reforms. Ultimately, teachers translate, interpret, modify and re-contextualise reforms as they enact the change proposals (Ball *et al.*, 2012). What is striking in the case studies is that, in several of them, researchers observed high levels of ambivalence, dissatisfaction, confusion and even resistance to reforms, conveyed individually or collectively via teacher unions.

In Peru, for instance, teacher evaluation generated substantial resistance, particularly due to the content of the policy, and the way it was formulated and communicated to teachers. Likewise, the Ministry encountered significant levels of resistance from teacher unions as they strongly opposed proposals which might undermine the job security of teachers. In Namibia, the policy was not "owned" by the local actors and USAID's attempt to institutionalise schools clusters in 2010 was also met with political resistance. In Turkey, more than half of the teachers who participated in the research resisted changes to the curriculum on the grounds that it emphasised the development of competencies at the expense of knowledge acquisition, thereby marginalising students' access to knowledge and intensifying social inequalities. In Uganda, teacher unions also resisted the PPP reform; however, they had very little discursive power to counter the arguments of the government or the powerful international donors which supported the PPP implementation. Furthermore, in Indonesia, some actors predicted that many teachers and teacher unions would likely resist reforms on teacher accountability as they were concerned about increased workload, poor evaluation procedures and corruption. The education reform proposals were considered unrealistic. Teachers were concerned that although the rhetoric of the reform emphasises accountability, motivation and education quality, in reality it might demotivate teachers and undermine education quality. Likewise, in Jamaica, there was pessimism about the new policy among teachers, growing concerns about its implications, and low levels of readiness for implementation.

Teachers' and their unions' apprehension towards reforms might partly stem from the fact that, in some cases, global reform advocates, policy makers and educationalists "blame" teachers for low education quality and use such arguments to make a case for the suggested reform proposals. For instance, in Peru, President Garcia referred to teachers as "lazy" and "ignorant", and proposed that the new mechanisms introduced by the teacher evaluation reform might improve their performance. In Jamaica, policy makers argued that there are no accountability mechanisms for teachers in the current education system and teachers were held responsible for low levels of education quality. Such attempts to "problematise" teachers and portray them as a group which fails to fulfil its responsibilities are likely to antagonise teachers and instigate defensive and resistant attitudes towards reforms, even at their initial stages.

Having outlined the main teacher responses to GMERs, the next section will review the challenges encountered during the implementation process and how reforms were enacted in different contexts. A closer look at these issues will also help to better understand the reasons behind teachers' dissatisfaction with the proposed reforms.

RECONTEXTUALISATION

The findings from the case studies indicate that teachers and other local actors encounter substantial challenges which compromised the implementation process to a large extent. In fact, a majority of the reforms analysed have failed or only partially managed to reach their objectives. The main issues identified by local actors included the following: teacher involvement in identification of problems and policy formulation, pace of reforms, training and information sharing, resource availability, and context.

Teacher involvement in identification of problems and policy formulation

One of the most frequently cited reasons for reform failure was that policy makers make certain assumptions as they design the policies and, often, these assumptions are not shared by actors at the local level. Or, they do not correspond to the realities at school and classroom level. In Jamaica, for instance, there are clear differences between how policy makers and teachers define teacher accountability. Although policy makers perceive no teacher accountability in the current system, teachers suggest that there are already internal accountability measures that govern their work. When policy makers develop policies without a thorough understanding of local-level actors and their work, the resultant measures are likely to fail in enhancing teacher accountability and might even undermine existing internal accountability mechanisms. Very often, the case studies revealed that teachers play a minor role in policy formulation. Again, in Jamaica, there was resentment among teachers that they were underrepresented in policy formulation process while the influence of international donors and consultants was substantial. Similar concerns and resentments towards the top-down approach to reform processes were expressed in other contexts as well, such as in Indonesia, Peru and Turkey. In fact, in Peru, one of the reasons for the fierce opposition to the reform was rooted in the top-down way the new policy was approved and implemented.

Pace of reforms

One of the aspects that characterise the reform efforts in our case studies is that they were formulated over a short period and the authorities proceeded with piloting and implementation very quickly. For instance, in Indonesia, there were concerns that the World Bank pushed for a quick implementation because of its own financial timeframe. The reform is described as a process of rushing to meet immediate deadlines and spend money. Sometimes, this rush to spend funds in predefined timeframes takes over and becomes the most important factor in decision-making. Likewise, in Uganda, the respondents noted that, due to pressing political impediments, significantly less consideration was given to planning an organisational strategy for the implementation process. In Turkey as well, the very short duration of the curriculum review process and nationwide implementation phase was criticised by several actors. Likewise, in Peru, some actors noted that policy formulation and implementation

had to move very quickly because of political-timing requirements. Hence, it became very difficult to carefully consider the opinions of teachers and other actors, and to plan the implementation phase. As a result, the implementation of teacher evaluation in Peru has been characterised by irregularities and imprecision. Hence, in various countries, the pace of reforms appears to be bruising for various actors involved in implementation at the local level. The only exception to these is Jamaica where the planning for implementation phase took almost a decade due to a lack of stakeholder buy-in.

Training and information sharing

Training teachers and other actors involved in policy implementation, as well as informing various actors about the content and implications of the reforms are highly important in education reform processes. However, there have been significant problems in this regard in all the case studies as teachers felt insufficiently trained and informed. Several actors did not, in fact, know much about the policies. In Peru, for instance, many teachers did not have any idea about what the teacher evaluation policy entailed. The Ministry did not clearly communicate how the policy should be implemented. This produced a lot of uncertainties and confusions among teachers and led to irregular practices. Similarly, in Jamaica, teachers felt insufficiently informed about the reform. They did not know much about the evaluation methods or consequences of underperformance. This limited teachers' ability to critically review the policy and express their concerns. In addition, teachers experienced high levels of insecurity about how the policy will affect their job security and day-to-day work. In Namibia, the decentralisation policy operates in a policy vacuum as there are no official policies to guide implementation of school-clusters. Training was not provided to subject facilitators who do not know what they are supposed to do in subject groups. In India, the need for professional pre-service and in-service training for contract teachers was most salient as they are often appointed to posts after a very limited induction period, ranging between seven to sixty days. Nevertheless, these teachers received limited or no professional development as the system is ill equipped to offer training even to its regular teachers. Furthermore, in Turkey, teachers were highly critical of the short duration and low quality of training they received prior to implementation. Therefore, they felt ill-equipped to implement the revised curriculum, and experienced high levels of uncertainties and confusions.

Resource availability

GMERs assign new responsibilities to schools and very often increase demands on teachers. Meeting these new demands require additional resources. However, in most cases, it was observed that additional resources are not provided to schools, and teachers are highly concerned that the implementation process will fail as a result. In Indonesia, for instance, policy makers appear to neglect the importance of providing adequate facilities to improve teacher motivation. Indonesian teachers believe that better classroom conditions and availability of teaching and learning materials would have the highest impact on their motivation and education quality. Yet, additional resource provision is not considered in the teacher accountability reform in Indonesia. Similarly, in Jamaica, there are substantial concerns that the new policy may not be operational due to a lack of resources. Teachers predict that unless more resources are provided to schools, the new accountability measures will effectively become punitive and will have a minimum effect on education quality.

Furthermore, in Peru, many teachers believe that even if teachers manage to be promoted to higher salary scales, the Ministry will not be able to pay them. Hence, the incentives behind the teacher evaluation policy are rather ineffective. In Uganda and Namibia as well, resource scarcity is mentioned as an important implementation challenge. In addition, in India where contract teachers are expected to undertake complex teaching in multi-grade environments, poor material conditions of classrooms are discussed as an important challenge. There are concerns that in the absence of such resources, as well as a lack of pedagogical support, contract teachers would encounter major strains, which might eventually undermine their motivation and performance.

Context

The case studies demonstrate the importance of contextual factors (institutional, historical, cultural, socio-economic) in the mediation of global education reform processes and, consequently, how difficult it is to prescribe policy solutions with the pretension of universality. Various actors have confirmed the importance of taking local context into account when adopting education policies (e.g. see the chapters on Indonesia, Turkey and Peru). There are frustrations among teachers that policies are adopted from elsewhere without adequate consideration of local context. When context is not adequately considered in education policy transfer, it may lead to negative or unintended outcomes. In Turkey, the case of research assignments and the revisions in textbooks illustrate the importance of considering context adequately. When learning is increasingly directed towards students undertaking research activities (with the assumed benefits in terms of rendering students autonomous learners and preparing them for lifelong learning), in a country where access to information resources (e.g. internet and libraries) is uneven, or very limited in some regions or for certain segments of society, such a policy compromises children's right to education and undermines their learning opportunities. Likewise, when textbooks are abandoned, so too is essential information on studied topics in a country where they are the primary and often 'the only' reference book for millions of students. Such a policy then also further exacerbates educational inequalities and marginalises students from lower socio-economic backgrounds as they have limited access to educational resources other than textbooks.

The chapter on Peru also highlights the dangers of considering countries as "monolithic categories". The tests to evaluate teachers are standardised in the country and administered in Spanish. Yet, there are significant differences between urban and rural, rich and poor areas, and between linguistic and cultural groups. Teachers in rural areas are mostly proficient in the vernacular of their indigenous languages, not in Spanish. They also live and work in poorer conditions, and have limited access to transportation (e.g. for travelling to take the exam in an urban centre). Similar concerns were raised in Indonesia and Jamaica suggesting that teachers in rural areas or in poorer urban locations would be disadvantaged by the new accountability policies as the policies do not take different school conditions into account. As Carnoy and Rhoten (2002) confirm, when policy makers ignore contextual capacity and culture at the national, regional or local levels, the reforms may result in some unintended and unexpected consequences. In some cases, they might also contribute to the deterioration of education quality even though the objective of the reforms was to improve education.

IMPACT ON TEACHERS' WORK

Teachers are at the centre of the most GMERs, either because the reforms themselves target teachers, or the reform proposals directly relate to teachers' work. In the case studies presented in this book, we see some indications of how the proposed policies influence teachers' work and their wellbeing. In the countries included, there have been various large-scale reform initiatives in the past decades. Several actors complained about "reform fatigue". In Jamaica, for instance, a teacher noted that the policy makers introduce new reforms with different names and labels attached, often recycling previous reform initiatives.

Where the reforms that directly target teachers are concerned (e.g. teacher evaluation and accountability), teachers recognised some potential benefits within the policy, but expressed strong reservations on the possible outcomes of the reforms. For instance, in Indonesia, a large majority of teachers believed that teacher evaluation can potentially motivate them to perform better, or they indicated that increasing salaries for well-performing teachers is a good policy. In Jamaica as well, teachers considered accountability reforms desirable as long as they are linked to an increase in educational resources and training. Likewise, in Peru, only a small percentage of teachers who participated in the study were opposed to the idea of being evaluated as they acknowledged some potential merits in evaluation.

However, the findings from all the cases indicate some pessimism about how the reforms will influence teachers' work and wellbeing, as several actors either predict or experience increased workload, bureaucratisation, stress, demotivation, alienation, and feelings of insecurity. In India, for instance, various actors argue that the recruitment of contract teachers negatively influences the teaching profession as they often encounter difficult working conditions, receive lower salaries than civil-servant teachers and have poor job security. Furthermore, such uneven conditions of service and a lack of career prospects may lower their motivation and fuel tensions among teachers. Critics also maintain that the creation of a separate teacher force by the appointment of contract teachers diversifies teachers' status and could have potentially a demoralising effect on teachers.

In Indonesia, teachers believe that the new accountability measures might be perceived as a source of stress and interference rather than as a strategy to develop their professionalism. As a result, the reform is likely to demoralise and demotivate teachers, impair the quality of teaching, increase teacher workload and demands on their time, and lead to further bureaucratisation. Furthermore, the policy might promote individualism and undermine cooperation among teachers. In Jamaica as well, teachers predicted that teachers and schools that receive a negative evaluation would experience increased pressure, especially schools in poor urban neighbourhoods which often lack resources and feel overwhelmed by multiple challenges. They are also concerned that the new accountability policy might undermine their internal accountability mechanisms which are characterised by internal consultations and debates.

Furthermore, teachers in Indonesia, Jamaica and Peru are concerned about the impact of accountability measures on their job security. Since they do not know how the reforms will take shape and affect their jobs, they experience confusion, apprehension and insecurity. They oppose sanctions that might compromise their job security. Such a "punishment" (e.g.

of being fired as a result of underperformance) is viewed as disempowering. Some argue that it might lead to a further deterioration of the social status of the teaching profession. Furthermore, teachers raise serious concerns with regard to the fairness of the evaluation system. Since the evaluations are standardised at national level in all three countries, they are insensitive to the regional or local differences in working conditions, student composition and resource availability. Hence, the measures inadvertently discriminate against teachers working in poor neighbourhoods or rural areas. The second important concern is corruption. Many teachers have serious doubts about the fairness of evaluations as they fear that the system might be corrupted.

Teachers in Turkey had other concerns. They believed that the emphasis of the new curriculum on the development of competencies at the expense of knowledge acquisition undermines the ability of mainstream schools to prepare their students for the nationwide exams, which govern transitions to upper levels of education. Therefore, teachers who were concerned about social equality or had high levels of commitment to their students attempted to compensate for the weaknesses of the curriculum by teaching more subjects. This appeared to increase their workload as they have to meet demands prescribed in curriculum documents in addition to undertaking teaching activities they considered important. Teachers also encountered increased pressure from parents to instil more knowledge. Some other teachers, however, who were not troubled with these concerns, suggested that the revised curriculum simplified their work and they experienced a decreased workload. Similar to the majority of Turkish teachers, principals and teachers in Namibia experienced increased workload and bureaucratisation, even though the decentralisation reform aimed at eliminating and reducing intermediate levels of governance.

Furthermore, the PPP policy in Uganda appears to have more wide-ranging consequences for teachers. It has resulted in the increased employment of underpaid, untrained teachers hired on a contractual basis, as they are considered more cost-effective for profit-oriented PPP schools. These teachers do not have job security, cannot negotiate their working conditions or salaries, and do not have strong union representation either. The PPP policy does not only have consequences for teachers working in those schools, but also for teachers working in public schools as well. The Ugandan actors talk about a “parallel and informal” labour market which undermines the status of professional teachers and weakens teachers unions’ capacity to negotiate at national level (UNATU, 2008). It is no coincidence that in the past number of years, there have not been any significant increases in teacher salaries or comprehensive efforts to improve teacher qualifications. These developments appear to undermine teacher motivation both in public and private schools.

CONCLUSIONS

This book has reflected extensively on the relationship between global education reforms of a managerial nature (GMERs) and teachers. Among other things, it has been observed that the effects of such reforms are highly sensitive to context, politics and institutional settings. According to how they are locally mediated and negotiated, the same type of policy can

adopt very different forms and, consequently, can have very different implications for teachers' work. This is, for instance, the case with 'accountability' policies. Today, accountability is a policy concept that has acquired 'global' status and has become very central in global education agendas. However, depending on how it is being recontextualized in particular locations, this global concept can have very different implications for teachers' work and professionalism. For instance, accountability can lead to a more professional approach, which involves peer-evaluation and self-regulation; a more participatory approach, which involves collaboration between teachers and other stakeholders; a more hierarchical approach, through performance-related pay and other surveillance policies; or a more market orientation that would be implemented via parents' choice/exit, competition and related incentives (West *et al.*, 2011; see Gulpers in this volume). Something similar happens with teachers' evaluation, which is a policy that can have a more formative and constructive nature (evaluation to provide an opportunity for teachers to reflect on their practices and to contribute to improve their training) or rather adopt a summative approach that links teachers' results to contingent rewards and sanctions (see Tuin *et al.* in this volume). Thus, before one evaluates and judges the impact of global education policies in abstract terms, one needs to discover the specific forms such policies have taken.

Overall, the country case studies presented reflect on how problematic it is to implement GMERs, but also on how problematic the content and the assumptions of the policies behind these reforms can be. In this respect, the main arguments that can be extracted from the book include:

- ***Universal solutions do not always fit within diverse education realities.*** In contrast with GMERs ambitions, case studies included in the book show that it is not accurate to advance universalistic managerial reforms because education cultures, teachers' identities, capacities and working conditions are very different around the world. Thus, blueprinted managerial reforms will have very uneven effects and will be received very differently according to these and other institutional and contextual factors.
- ***Easier to write than to implement.*** GMERs may appear very convincing due to their constant references to market metaphors and the use of other persuasive analogies. However, in practice, GMERs need to be translated into a web of complex policies, whose implementation is problematic for technical, material, but also political reasons. Managerial reforms are based on assumptions, usually coming from economic theory, that are not supported sufficiently by the reality of most education systems. The competitive market requirements such as those of perfect information, high levels of offer, zero barriers for schools to entry/exit the 'education market', etc. are not present in most countries, especially in developing countries or rural regions. Moreover, these requirements are very difficult to promote through state policy and state regulation without generating a significant number of market imperfections, transaction costs and inequalities (see, for instance, the problems associated with Chile in Bellei, 2009, or Patrinos *et al.*, 2009).
- ***Despite GMERs being aimed at quality improvement, they can, in fact, put quality at risk.*** Managerial reforms expect that, if the regulatory conditions are appropriate, a range of mechanisms to improve education quality will be correctly activated (for instance, 'community becoming more vigilant of schools', 'schools competing to increase the quality of the service', 'families exiting underperforming schools', and so on).

However, the activation of these mechanisms is highly speculative and contingent on a long series of causal actions that do not necessarily fit within education agents' motivations and strategies. Today, there is significant evidence that contradicts market analogies in education by showing that, for different reasons, most families do not send their children to the highest quality school available and rather choose schools according to other criteria (Härmä, 2009; Fennell, 2012; Waslander, 2010); or that it might take several years, even decades, for a bad school to be closed due low levels of demand (Stuit, 2010). This implies that, in the meantime, many students would be losing out on quality education and other future opportunities. In quasi-market situations, there is the risk that the state does not feel the urgency to fix the existing and often-pressuring educational problems in its domain. As stated in the 2009 EFA Global Monitoring Report, managerial reforms should not be implemented by states as a way to decline their responsibilities with providing quality education for all. National governments need to "recognise that school competition and choice, and private-public partnerships have their limits". Thus, "if a public education system works poorly, the priority [of the government] must be to fix it" (UNESCO, 2009, p.7).

- ***The political economy of GMERs.*** The gap between policy-planning and actual practices will increase especially when teachers, who are the key stakeholders in enacting education policies, are excluded from the policy debate, or when policies are poorly communicated to schools, as reflected in many of the cases in this volume. Managerial reforms usually conceive of teachers as an asset to be managed instead of as subjects of educational change, and therefore do not consider them as key stakeholders in developing policy processes. Such divergent and excessively instrumental conceptions generate distrust between education planners and teachers, and implementation becomes even more uneven and contested.
- ***GMERs are grounded on broad assumptions about teachers.*** Using Le Grand's (2006) famous categories, GMERs advocates think of teachers more as knaves than as knights. They often assume that teachers could do their work better, but that they do not do so because they are lazy, or are not sufficiently 'motivated'. Of course, as Apple (1999, p. 1) put it once, this book does not assume that "all teachers are great and need no improvement"; however, building state policy on the concept of teachers as knaves or free-riders reflects a very generalised understanding of teachers' needs, motivations and identities. The policies emerging from these concepts might be misleading and would be a way of sanctioning many good teachers. These assumptions can be even more pernicious and disrespectful in the case of low-income countries where teachers are poorly trained and their working conditions are not attractive enough. In these cases, governments should try to fix quality issues in a more fundamental way (by, for instance, professionalization strategies and a more demanding selection) rather than on the basis of incentives or competition mechanisms.

The different chapters in this book are critical and, on occasions, sceptical of the dominant paradigm of managerial education reforms. However, this book is not against 'education reform' in itself. In fact, the volume rather provides elements to reflect on educational change processes that could be, on the one hand, more in tune with the education realities and issues prevailing in their particular contexts and, on the other, more participatory and respectful

of teachers' needs and identities. Key suggestions are listed below, based on the findings of the book, which could lead to policy processes and education reforms that fulfil the above-mentioned qualities:

- Adequate attention to context should be given while adopting education policies from global agendas or while borrowing them from “elsewhere”. The reforms should be sensitive to regional and local differences within a country, and blueprint and monolithic approaches should be avoided.
- A “quick fix” approach to reform implementation needs to be avoided. The implementation phase should be carefully planned and organised. On-going contact with teachers and other local actors should be facilitated in order to receive their feedback and to better adapt the reform to local realities and practices.
- Teachers and other local actors should be involved in the whole policy process, from formulation to evaluation. This will guarantee that educational reforms are based on needs analysis and correspond to the priorities and necessities identified by schools and other local stakeholders. In fact, reform success largely depends on the extent to which local actors agree with the urgency of the reforms, their objectives and the means to reach them. In other words, reform success depends on the extent to which local actors enact education change.
- The reforms should be communicated clearly and efficiently to the actors involved in implementation at regional and local levels. This would avoid insecurities, confusions and irregularities among local implementation partners.
- Adequate resources need to be provided to local actors in order to improve their capacity to implement educational changes successfully. Among these resources, teachers and other key stakeholders should benefit from training related to the new policy before the implementation phase starts.
- Teacher resistance to education reforms should not be considered always as a “problem” or a “conservative act” in itself. Resistance to reforms, and the consequent negotiations and debate it might generate, provide opportunities for policy makers and aid agencies to reflect on the reform proposals and to improve future interventions.
- Educational policies need to be aligned. If a new education policy (e.g. curriculum emphasis on the development of competencies) contradicts another newly introduced policy or an existing policy (e.g. nationwide exams governing the transition to post-primary education in Turkey), the implementation of the new policy will encounter serious setbacks. Therefore, the alignment of the new policies with existing policies should be carefully examined, and possible conflict between them should be addressed.
- Last but not least, education reforms, beyond punctual and isolated interventions, need to make sure that the necessary conditions (i.e. material, training) and the right environment (including appropriate regulatory frameworks and higher levels of equity within and between schools, OECD, 2009) are guaranteed by the state and available for teachers and schools if society wants them to ‘make a difference’.

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