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How do organizations learn and how do new reform strategies in education emerge? This article suggests that educational reforms are cyclical in that they follow a trial-and-error pattern to a point of burn-out thereby giving way to new ideas that grow epidemically or exponentially. After a while the effectiveness of these new reform ideas also become contested and are replaced with new ideas. However, since reform ideas surface cyclically, some of these «new» ideas should be considered, at closer scrutiny, as old. A relatively new feature of policy agenda setting and decision-making is a commitment to knowledge-based regulation and evidence-based policy planning. The theory of the post-bureaucratic state as well as transnational policy borrowing and lending are briefly sketched to situate knowledge-based regulation against the backdrop of the larger issue of globalization in education. The question becomes: Has knowledge-based regulation suspended cyclical reform movements?

**Keywords:** accountability · policy studies · school reform

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# Knowledge-based regulation and the politics of international comparison

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## The reform cycle

The observation that the same reforms resurface periodically is not new. One example of recurring reforms, mentioned by Tyack and Cuban (1995), is the idea of school-business partnerships that, starting in the 1960s, periodically surfaced, got implemented, became criticized, was suspended, and, after a while, was reintroduced and erroneously presented as a novel, innovative and unprecedented approach to reforming schools. School-business partnership or, more broadly, public-private partnership (PPP) is but one of many reforms that has been periodically recycled. Modifications in the design occur every time it is reintroduced either because the policy context and the impetus for reform have changed, because policy makers attempt to make an old reform look new, or because there is no institutional memory left of previous experiences with the similar reform.

Recycled reforms also abound in developing countries. In Mongolia and in neighboring Central Asian states, for example, the pendulum between decentralization and recentralization of educational finance swings all couple of years (Steiner-Khamsi & Stolpe, 2006) in the opposite direction. After years of preparing a

decentralization of finance in the late 1990s, which entailed spending sizeable financial resources for preparing the legal foundations as well as for training government officials at district and school level for the incumbent task of collecting and administering funds locally, the reform was suspended only a few years later.

A few aspects of the decentralization reform were preserved and carried over into the new recentralization of educational finance, but the overall rationale for a comprehensive decentralization of finance was considered faulty and ultimately dismissed. The pace with which one set of reform is replaced with an entirely different, at times opposite set of reforms is perhaps nowhere as fast as in developing countries. This fast pace of reforms in developing countries, which outsiders first labeled as the period of *transition*, nowadays *consolidation*, and overall chaos, reflects the rapid political and administrative turnover in these countries as well as the skepticism towards first pilot-testing and reviewing a new initiative before introducing the reform at a large scale.

It would be wrong to assume that policy makers in developing countries are alone with standing up for the same kind of reforms that they, a few years earlier, vociferously attacked for being ineffective. There are many pendulums that swing in educational reforms. Besides the pendulum between de- and recentralization, there also is a pendulum between small-school and large-school reforms in some countries. In the United States, the charter school movement in inner-city schools triggered the most recent revitalization of the debate on whether students perform better in small or in large schools. With support from public as well as private funds<sup>1</sup> large schools split into smaller units with different charters. As a result, large schools with two or more thousand students end up hosting several small schools in the same school complex. Needless to

state, every reform is contested, that is, supported by some and opposed by other groups. As a corollary, the question is why some groups succeed in enlarging their policy alliances and, in most cases, manage to secure financial and political support for their educational visions. Before offering a theory of policy change that explains cyclical reforms, I would like to draw on one particular example in greater detail: the reform cycle with regard to improving the quality of education from the mid-1970s until 2008.

The proponents of outcomes-based, standards-based or competency-based education have elevated the term *accountability* to a key concept for regulating the quality of education. By doing so, they suggest that neither teachers nor students were sufficiently held accountable for their actions, let alone for the learning outcome of students in previous times. Naturally, from a historical perspective, such an assumption is absurd as the transfer of education authority over a child from one educative site – home, church, street – to school, has by default set in motion an elaborate system of accountability and control. What has changed, however, is the object of accountability and the locus of control: at periods of time, teachers were held accountable for the learning outcomes of students whereas at other times, students themselves were made responsible for their learning outcomes.

Furthermore, in some of the reforms, the importance of intrinsic motivation (of teachers or students) was highlighted, whereas in other periods a reform model was pursued that strengthened an extrinsic motivation. Given my earlier policy work in Western Europe and my current involvement in the United States, I have European and American reform stages in mind when describing the following stages of the quality improvement reform cycle. Cultural variations are, as I will briefly mention later, considerable and should not be underestimated. For the last policy stage (emphasis on ex-

trinsic motivation of students), I am making references to my observations in New York as well as in developing countries:

*Stage 1:* Emphasis on intrinsic motivation of teacher (since mid 1970s). Boom in in-service training of teachers that attempt to enhance professionalism of teachers.

*Stage 2:* Emphasis on intrinsic motivation of students (since late 1970s/early 1980s). Proliferation of programmed learning and individualized learning with an emphasis on formative student assessment and students' individual learning style.

*Stage 3:* Emphasis on extrinsic motivation of teachers (since mid 1990s). The birth of the accountability discourse based in standards-based or outcomes-based educational reforms.

Requires teachers to establish annual targets with regard to student outcomes for which they are held accountable by others, notably by the school administration, but also by parents and district-level education authorities.

*Stage 4:* Emphasis on extrinsic motivation of students (since 2007, New York City). Tailored after conditional-cash transfer programs in developing countries (in particular, Mexico), students are given cash incentives for remaining in schools and for passing standardized tests.

The general move, over the past thirty years or so, from intrinsic to extrinsic motivation as well as the shift of attention from teachers to students, is depicted in Figure 1.

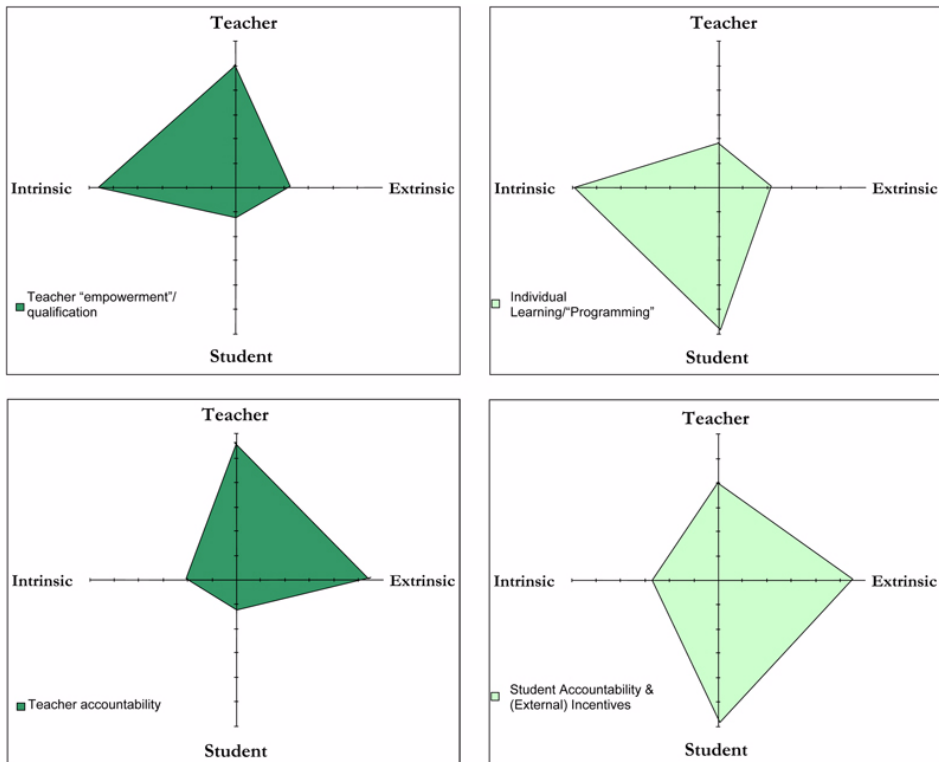


Figure 1. The Quality Improvement Reform Cycle, Mid-1970s to 2008.

Several scholars witnessed dramatic shifts from one stage to another at a time when an actual transition was taking place. Writing in 1989, Thomas S. Popkewitz and Kathryn Lind (1989), for example, noted that in the wake of *A Nation at Risk* (National Commission on Excellence in Education, 1983) teacher professionalism (Stage 1 in Figure 1) was replaced by teacher incentive schemes (Stage 3 in Figure 1) such as creating career ladders and performance pay for teachers.

The last stage (Stage 4 in Figure 1), currently taking place in New York City, deserves a few comments as this strategy of quality improvement might in the future also be borrowed by other educational systems. In 2006, Mayor Michael Bloomberg of New York established the Center for Economic Opportunity (CEO) to combat poverty in New York (Center for Economic Opportunity, 2007). One of the many programs that has been designed, administered, and monitored by CEO is labeled *Opportunity NYC*. This particular program is inspired by the conditional-cash transfer programs (CCT), implemented for years in developing countries. The New York City (NYC) CCT program is tailored after the Progreso program in Mexico after a detailed review of the Mexican CCT model as well as on-site assessments, by means of study visits, in Mexico City. Opportunity NYC provides family and work awards as well as monetary awards to public schools students that have demonstrated academic improvement. The latter program is tailored to students and is entitled *Opportunity NYC: Spark*.

The incentive plan targets fourth- and seventh-grade students. The amount of payment depends on the grade level and test score. Fourth-grader receive cash amounts from \$5 (just for taking each of the ten standardized tests administered throughout the school year) to \$25 for each perfect

score. The amount is higher for seventh-grade students: \$10 for taking the test (up to \$100 if all tests are taken) to \$50 for each perfect score (up to \$500 for perfect scores on each test). In its first year, Opportunity NYC: Spark enrolled 8,583 students from over thirty NYC public schools (a \$5,000 cash incentive was paid for each participating school). The objective of the pilot program is to close the achievement gap.

Other incentives discussed include \$50 for 95 percent school attendance, \$25 for attending parent-teacher conferences, \$40 for obtaining a library card as well as replacing the cash transfer with cell phone minutes for well-performing 4th and 7th grade students. The pilot project Opportunity NYC is an ambitious and, with \$53 million funding, an expensive pilot project that is entirely financed from private foundations.<sup>2</sup> It will be annually evaluated by means of an impact evaluation that involves a comparison of treatment and control groups. The CCT program made not only headlines in the *New York Times* but also in other American newspapers as well as on CNN (June 20, 2007). Perhaps needless to point out, the pilot project has been criticized for motivating students to learn for the wrong reasons (e.g., Chennault, 2007; Farley & Rosario, 2008; see also Morais da Sà e Silva, 2008).

I have selected the example of Opportunity NYC: Spark because it targets, without doubt, students' extrinsic motivation to learn. What if the extrinsic motivation and the focus on students fail to improve learning outcomes? Will policy makers re-open the reform cycle for quality improvement? Will they resort to what was done years ago: invest in teachers (in-service training and life-long learning of teachers) and believe that a greater sense of professional identity and better professional skills will lead to a better performance of students?

## Reform burn-out and reform epidemics

The term *stages* for denoting the various reform models within a reform cycle should be used with caution. As mentioned before, the four stages only describe reform trends in the North American and Western European contexts.<sup>3</sup> Furthermore, once a reform idea surfaces it continues to be embraced by some groups and hybridizes and continues to exist, in one way or the other, at the next stage. In line with the epidemiological framework of policy studies, it is more accurate to state the approximate beginning stage of a reform idea rather than a beginning as well as the end stage. Reform ideas eventually «burn out», but they still linger around for a very long time. In effect, reform ideas burn out or go dormant until they are, for a variety of reasons, revitalized at a later time. Figure 2 presents the Lazy S-Curve that has been used to explain explosive growth of epidemics. Scholars in social network analysis (Watts, 2003) have used the epidemiological model to explain the diffusion of innovation and ideas, and several of us have adopted the model for the study of educational reforms (Steiner-Khamisi & Stolpe, 2006).

The Lazy S-Curve illustrates how reform ideas, labeled *stages* in the earlier discussion of reform cycles, burn out after a while. But how does a reform idea catch on, that is, assemble a sufficient number of followers or believers infected by the reform idea in order to move, as Figure 2 suggests, from a slow growth phase to an explosive phase? What is addressed in this question is the need for a theory of policy change. These theories are essential for understanding cyclical school reforms, in particular, the move from one stage to another.

There is no scarcity of such theories in educational policy studies (e.g. Sabatier, 2007). Rather than itinerating various theo-

ries of policy change, I would like to highlight a theory that has drawn great attention in comparative education policy research: policy borrowing/lending theory. The theory has been applied to cross-national policy transfer and to a lesser extent to cross-sectoral policy transfer, e.g., notably from the economic sector or health sector to the education sector (quasi-market regulation, total quality management, etc.).

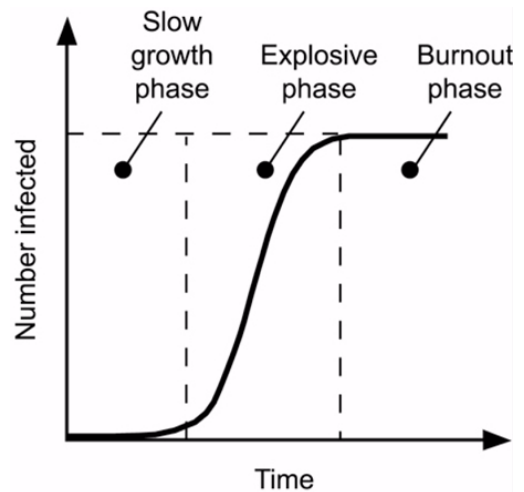


Figure 2. The Lazy S-Curve. (Watts, 2003, p. 172)

The British historian of education David Phillips has explored reasons for cross-national policy attraction whereas the German comparatist Jürgen Schriewer has applied the theory of self-referential systems (Luhmann; e.g. 1990) to explain why at particular moments a recourse is made to experiences in other countries. «Das Ausland als Argument» (Zymek, 1975; Schriewer, 1990; Gonon, 1998), that is, justifying the introduction of new, oftentimes contested policies by making references to (good) experiences in other countries, is a recurring research topic in German comparative education research.

In concert with this line of research, several research projects were completed at my own

university that investigate in greater detail at what moment and with what effects cross-national and cross-sectoral policy borrowing have occurred (Steiner-Khamsi, 2004). Borrowing entails both the actual transfer of policies as well as discursive transfer whereby only the idea or the rationale of a policy (e.g., choice) is transplanted without emulating or adopting the best practices or the actual policy from the other context. We found that the likelihood of lesson-drawing, emulation, or policy borrowing enhances when there is a protracted policy conflict in a domain or in a sector. Borrowing tends to have a salutary effect in situations of a reform stalemate when two and more competing policy coalitions are equally powerful.

The recourse to policies in other contexts serves as a source of external authority, albeit internally induced, and helps generate additional meaning (*Zusatzsinn*; Luhmann, 1990). I therefore proposed to treat policy borrowing as a certification strategy (Steiner-Khamsi, 2004) which gives leverage to those policy coalitions that successfully network across national and sectoral boundaries. The inclusion of external policy actors (that have been internally mobilized) enables to advance reforms that lacked support and otherwise would have been contested. In comparative education research, the act of making references to discourses or practices outside the own sub-system is called *externalization* (Schriewer, 1990) and in social network analysis, the ties forged with individuals or institutions outside the own network are called *weak ties* (Granovetter, 1983; Watts, 2003). Externalization and weak ties reflect *policy learning* and are nowadays considered key concepts for the comparative study of policy change.

Within policy studies, the theory of policy borrowing/lending is related to the Punctuated-Equilibrium Theory, proposed by Frank Baumgartner (Baumgartner & Jones,

2002). The terms *borrowing* and *lending* evoke wrong associations with spatial linearity and directionality, suggesting that a policy or a policy discourse is transferred from one context to another. It is important to bear in mind, however, that references to other experiences are no longer necessarily country-specific (e.g., reference to New Zealand for the import of New Public Management policies), but increasingly deterritorialized: references are made to international standards, which, more often than not, are opportunistically defined. To avoid the undesired association with spatial determinism, a few scholars have replaced the terms borrowing and lending with *traveling reforms* (Ozga & Jones, 2006) and draw attention to reforms that have surfaced, at times concurrently and at times with a time lag, in different corners of the world. In another publication (Steiner-Khamsi, 2007), I therefore concluded that globalization or reference to international standards is nationally induced to generate a quasi-international pressure on domestic reforms.

## Knowledge-based regulation and the politics of comparison

When I worked for the Ministry of Education of the Canton of Zurich, Switzerland, from 1979 until 1988, all reforms had to be presented as home-spun even if they had been borrowed or imported from abroad; in fact, even lesson-drawing from the neighboring canton had to be downplayed. The thought that there was something to learn, possibly to be transferred, from other educational systems would have triggered great cultural and political resistance. Strikingly nowadays, not only in Switzerland, but also in other countries the opposite seems to apply. What explains this turn of perceptions on the value of regional and international experiences in educational reform?

Over the course of twenty years (only), we have come to accept the existence of transnational regimes in education, such as the OECD, IEA (International Association for the Evaluation of Educational Achievement), the World Bank, UN organizations (notably, UNESCO and UNICEF), and many non-governmental organizations, that influence policy agenda setting at national levels. These organizations have existed for a long time, most multilateral organizations since World War II and IEA and OECD since the late 1960s, but it is only for the past few years that experts and policy makers instrumentally evoke them as sources of authority whenever there is a need for an (international) stamp of approval to push through domestic reforms that otherwise would be contested. The increased use of experts from transnational regimes as backstage advisors for national (policy) agenda setting has been remarked by many scholars, most recently by scholars in the European research network Knowledge and Policy in Education and Health Sectors (KNOW & POL).

KNOW & POL represents one of the most promising research projects in policy studies that is currently conducted in Europe. It assembled twelve research teams from eight European countries to investigate how knowledge is constructed and used in policy formation processes.<sup>4</sup> Under scrutiny were the education and health sectors in Belgium, France, Germany, Hungary, Norway, Portugal, Romania, and Scotland. During the first phase of the project the research teams examined what kinds of policy knowledge is constructed and appropriated by what type of policy actors. Subsequently, in the next two phases the same teams will analyze concrete cases of knowledge adoption to understand how the recourse to a specific kind of knowledge is used by decision-makers for regulation, but possibly also for har-

monization in a new European policy environment.

The interpretive framework of the KNOW & POL study is the theory of the post-bureaucratic state, masterfully explained in the literature review by Xavier Pons and Agnès van Zanten (2007), reflected on in the commentary by Rianne Mahon (2008) and in the *Integrative Report* (Kosa, Maury, Mélotte, Mossé, Ozga & Schoenaers, 2008), and addressed in the various country studies. The literature review on *Knowledge Circulation, Regulation and Governance* presents the main features of New Public Management that, according to Pons and van Zanten (2007), set in motion the evolution of post-bureaucratic states. In such states policies are, among other features of the post-bureaucratic state, initiated, monitored and evaluated by multiple actors (including non-state actors, including transnational regimes) as well as formulated with a set of measurable benchmarks, targets and outcomes.

Five of the features of the Opportunity NYC: Spark manifest the features of knowledge-based regulation which are examined in great detail in the KNOW & POL research network, in particular: (i) assessing the quality education exclusively by means of standardized tests of students, (ii) regulating by offering incentives for reform (in this case: cash incentives), (iii) monitoring progress by evaluating targets that were established in outcomes-based contracts, (iv) relying exclusively on statistical knowledge for assessing the effectiveness or impact of a reform, and (v) partnering with state as well as non-state actors (e.g. Rockefeller Foundation).

The insistence on the use of scientific knowledge for assessing educational reforms (Hess, 2008) is, in effect, a credo for large, expensive, quantitative impact evaluations. They are conducted both nationally and internationally. Increasingly, transnational actors such

as the OECD, IEA, the World Bank, the UN organizations, etc., draw on their comparative advantage as a source of authority for assessing national education reforms. These transnational regimes in education establish data banks or «knowledge banks» with comparative data, not only on the quality of education (e.g., international student achievement tests), but more recently also on best practices in education.

The knowledge banks on best practices rely on effectiveness studies or, more precisely, on impact evaluations. Impact evaluations have within a short time-period become the standard tool for policy evaluation. They are by design costly because impact can only be measured by comparing entities (schools, classrooms, students, teachers, etc.) that were exposed to an intervention with those that did not undergo an intervention or treatment. Besides the quasi-experimental design, comparing treatment and control groups, impact evaluations tend to draw representative samples making, in some countries, the evaluation of a reform more expensive than the reform itself.

A good case in point is the impact evaluation of the READ (Rural Education And Development) project in rural Mongolia, funded by the World Bank. READ provided children books to classrooms (40 books per grade level) in rural primary schools. The impact evaluation sought to assess two questions: first, do books make a difference for improving literacy skills of students, and second, does a preparation of teachers for integrating children books into their teaching matter? As with all quasi-experimental designs, the impact evaluation was methodologically rigorous, comprehensive, and costly. The design of the impact evaluation study is:

*«Full-Treatment» Group: 3 Provinces*

All primary classrooms in rural schools (in 3 provinces) receive 40 children books PLUS

all teachers in these schools receive training on how to integrate children books into their teaching.

*«Semi-Treatment» Group: 2 Provinces*

All primary classrooms in rural schools (in 2 provinces) receive 40 children books per grade.

*No Treatment Group (Control Group): 15 Provinces*

None of the primary classrooms in rural schools (in 15 provinces) receive children books and none of the teachers receive a training.

The same standardized student achievement test was administered to primary school students and used as a tool to assess the effectiveness of the two interventions: (1) books only and (2) books with training. As methodologically solid the design the impact evaluation was, the question still arises: whom does such an impact evaluation serve? For sure, it is of limited value for improving the design of the READ project. For the project staff in Mongolia, a formative project evaluation with recommendations on how to improve the implementation of the project was of much greater utility than the comprehensive study based on a quasi-experimental design.

Furthermore, the research questions pursued in the impact evaluation were irrelevant for decision-makers in the Mongolian education sector. They had no doubt whatsoever that both children books and teacher training are much needed and they found it unethical to withhold books and training from rural schools in fifteen provinces (control group) only to see whether the two interventions really have had an impact on students' literacy skills. Finally, the decision-makers resented that such a great amount of money was spent on the impact evaluation,



and in particular on international consultants conducting the study, rather than on distributing books and training to more schools and provinces in Mongolia.

There was no doubt on anyone's mind that the READ project filled an important gap in rural schools: provision of books and training. There was a great sense of gratitude towards this grant from the World Bank that enabled to revitalize schools in rural Mongolia. But whom did the impact evaluation serve? As mentioned above, it was not meant to serve Mongolian decision-makers but rather it was commissioned for the funder, the World Bank, itself. As with other international organizations, the World Bank has established knowledge banks in which it evaluates its own projects and selects a few project as best practices which it subsequently disseminates to other countries in the world. What some scholars call the *scientific method* in educational research (quasi-experimental design) or *evidence-based policy planning* serves international organizations to package existing projects, selected as best practices, and adapt them to different national and cultural contexts.

## Conclusions

Having presented the «revolving door» in educational reform, one would assume that the proliferation of impact evaluations would help to break the cycle of recurring reform ideas. It remains to be seen whether knowledge-based regulation will produce fundamentally new strategies for reforming education. I doubt it. It would be naïve to assume that a reform stays in place longer only because it has received a scientific stamp of approval. Political support for a reform matters more than an agreement among educational researchers that a reform actually works. As a corollary, it is often at a moment of political disagreement

when educational researchers are contracted to make a case either for or against an ongoing reform.

In *Spin Cycle*, Henig (2008; see also Hess & Henig, 2008) points out that policy decisions result predominantly from favorable policy alliances and political constellations rather than from so-called scientific research or impact evaluations. Scientific studies only resonate if there already exists a political receptiveness towards new insights gathered by empirical evidence. If such a political receptiveness exists, then evidence-based research is used as a leverage to accelerate reforms. But without political receptiveness, there is little to expect in terms of change from one reform cycle to the next nor from one fundamental reform to another.

When a new slogan surfaces, such as «knowledge-based regulation in education», the question always becomes: what was before and what does it claim to replace? The theory of the post-bureaucratic state, adopted by the KNOW & POL project to analyze education and health reforms in eight European countries, might provide a few important clues. The theory helps to explore whether the stamp of scientific rationality (Luhmann, e.g. 1990), tried in knowledge-based regulation, has indeed replaced other sources of authority for either embracing or dismissing an ongoing reform?

According to the theory of the post-bureaucratic state, a network of new actors in educational reform has come into play. The network includes both state and non-state actors. These actors are affiliated at the same time with national and international institutions. They are transnationals. The alliance of these varied, state and non-state actors for propelling or hindering national reforms, respectively, is indeed novel. The reliance on non-state actors and transnational regimes for (national) agenda setting has become an object of recent scrutiny in policy studies. It

is a trend that is also closely followed by researchers in comparative and international education as we witness how international comparison is increasingly used to advance national reform agendas.

## Notes

**1** Examples of the small schools movement that have been funded by philanthropies include the New Visions for Public Schools, funded from 1993–1998 by the Annenberg Foundation, and The New Century High Schools, co-funded by the Bill and Melinda Gates Foundation, the Carnegie Corporation of New York, and the Open Society Institute.

**2** Rockefeller Foundation, American International Group, Annie E. Casey Foundation, Center for Economic Opportunity, John D. and Catherine T. MacArthur Foundation, MDRC, New York Community Trust, Open Society Institute, Robin Hood, Seedco, The Starr Foundation.

**3** A legacy from the socialist past, teachers in Mongolia and Central Asia, for example, are strictly held accountable for the learning outcomes of their students. Ironically, the development banks (Asian Development Bank, World Bank) that have funded outcomes-based or result-based education present *teacher accountability* as a brand new concept and attempt to introduce teacher incentive schemes that link student performance to bonus payments for teachers. The idea of bonus payments for teachers resonates very well with teachers for they are accustomed to receiving additional cash payments for students that perform well at student competitions (olympiads).

**4** The European research project is well documented on the project website <<http://www.know&pol.org>>.

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