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NEPC REVIEW: BEYOND THE MIRAGE: HOW PRAGMATIC STEWARDSHIP COULD TRANSFORM LEARNING OUTCOMES IN INTERNATIONAL EDUCATION SYSTEMS



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October 2019

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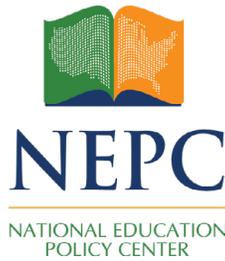
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Executive Summary

A new report, *Beyond the Mirage: How Pragmatic Stewardship Could Transform Learning Outcomes in International Education Systems*, prescribes a shift in the leadership role of education ministers – from providers and guarantors of education to pragmatic stewards of education systems. Focusing on the organization of education sectors in the Global South, the report contends that this shift will address the need for higher quality education, rather than simply providing access to education. The “pragmatic stewardship” advocated in the report involves strategies that increasingly incorporate private actors. Accordingly, the report draws on four case studies of different types of private-sector involvement in education as examples of a broader shift by education ministers. However, each case contains limitations – some discussed, others not – that undermine their suitability as successful examples of divesting public education systems of their primary role as guarantors and providers of education. While the report claims to be “non-ideological” and “beyond the mirage” of the education privatization debate, the funders of the report (no publisher is listed) have a material stake in a main program cited as evidence, raising concerns about conflicts of interest. The use of questionable evidence and the conflicts of interest combine to render the report’s recommendations unsubstantiated.



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I. Introduction

Since the Education for All (EFA) movement began in Jomtien, Thailand in 1990, education stakeholders globally have recognized the need to not only increase primary school access, but to improve the quality of education as well.¹ A new report entitled *Beyond the Mirage: How Pragmatic Stewardship Could Transform Learning Outcomes in International Education Systems*, by Katelyn Donnelly, Arvind Nagarajan, and Ross Lescano Lipstein, begins with this goal of improving education quality.² The report provides a nested set of suggestions for this process, including reimagining education leadership as a “pragmatic stewardship” model – emphasizing monitoring, outcomes, and accountability – and providing an education ecosystem conducive to different types of education operators. The report then draws from four case studies of different approaches to education that include substantial private-actor involvement.

The report title *Beyond the Mirage* refers to the argument by the authors that the report moves beyond the public-private debate in education. Nevertheless, the report does begin with a chart showing how it distinguishes between public and private, differentiating between these types of schools in two areas: funding and operation. The report defines traditional public schools only as those *both* operated and funded publicly. Private schools are both operated and funded privately, while charter schools are publicly funded but privately operated. Vouchers and other privatization schemes blur the line between public and private funding and represent a key mechanism in some of the case studies presented in the report.

This review examines the evidentiary support for the findings and policy recommendations made in this report. Given the extensive scope and scale of the report’s policy recommendations, the burden of proof should be equally high. Education policymakers worldwide are facing increased calls to involve private actors in their public education systems (if not

already present). These policymakers will likely be interested in analyses of the empirical validity of reports, such as this one, that promote the expansion of this approach. Other education stakeholders also have an interest in the topic given the implications for every facet of education, from curriculum decisions to the role of testing, teacher preparation, certification, and the overall status of the field.

II. Findings and Conclusions of the Report

The report offers a series of policy recommendations about the organization of education sectors in the Global South. The main recommendation of the report is for government officials to become stewards of education systems rather than providers and guarantors of public education. The report provides three models for this approach, discussed below, all with different levels and types of private-actor involvement: 1) drive delivery, 2) combine forces, and 3) unleash the citizen. These models are presented on a spectrum from “status quo” public systems to wholly “privatized systems” (p. 67). To implement these models, the report identifies key foci for education ministries: a focus on outcomes and results rather than inputs; a commitment to gathering and using timely, honest data; and (de)regulation allowing for increased private-actor involvement.

Drive Delivery

On the spectrum from public to private provision of education, the drive delivery model involves mostly public delivery while allowing for some private-actor alternatives. Drive delivery does not represent a systemic shift. Rather, it’s a precursor of models more saturated with private involvement. The report cites two main risks: backsliding and (de)regulation. Backsliding occurs when institutional turnover reorients the system to the public model because the drive delivery model does not include deep systemic changes. Regulatory risk occurs when additional output regulations (presumably such as accountability for test scores) are not accompanied by input deregulation (such as funding and staffing decisions). The report states that “regulators should approach their task as one of removing most traditional regulations” (p. 70). In practice, the report cites the softening teacher certification and accreditation to expand the teacher pool as an example of an important deregulatory step.

Combine Forces

The combine forces model adds to the drive delivery model by opening up the operation of schools to non-governmental entities. This primarily occurs in two ways: through partnerships in the form of either school adoption or school management. In the school adoption model, the government contracts with private entities to manage teachers, such as in a turnaround situation for failing schools. In the school management model, the government outsources the entire education responsibility to private contractors. The report refers to a Liberian case study as an example of both types; private operators had the “ability to replace teachers” and had “first choice of fresh graduates joining the teaching force” (p. 73). Risks inherent to this approach include issues with partner selection, contracting, and enforcement.

Unleash the Citizen

Short of entirely privatizing the system, the “unleash the citizen” model refers to voucher programs. Through vouchers, any provider – public, private, religious – can receive public money for enrolling students. The report mentions that the voucher efficacy evidence is mixed even while it justifies their use by stating that parents have already “voted with their feet” (p. 24). The report finds vouchers particularly applicable to low-income countries because “costs are high, teacher accountability is low, and reforming providers is difficult” (p. 76). The risks outlined in the report include lack of transparency around data (increasingly difficult with private actors) and corruption (a substantial risk when private entities receive public funds).

To implement any of the three suggested models, the report identifies nine recommendations for education system stewards in their process. The report details requirements for each of these steps, but briefly, the steps are:

- “1. Bold and sustained leadership
2. Accountable and continuous delivery
3. Well-enforced regulations to align incentives
4. Transparent measuring and data flow
5. Long-term mindset
6. Maintain flexibility for innovation and experimentation
7. Infuse the system with a culture of integrity, performance, and drive for results
8. Focus on end learning outcome results
9. A guiding coalition and ever widening circles of leadership to see the reform through” (p. 80)

The report concludes by reemphasizing the (allegedly) non-ideological approach taken, the role of education ministers as stewards, and the importance of private actors in education.

III. The Report’s Rationale for Its Findings and Conclusions

The report’s rationale stems from historical trends and case studies. First, the report reviews some education history from the last 30 years, highlighting the achievements of the public sector in increasing access while pointing out the overall lack of progress on education quality, specifying areas that might have contributed to this issue. The report then delves into findings from case studies in four locations – Punjab, Pakistan; Liberia; the Philippines; and Delhi, India. These studies consist exclusively of cases with substantial roles for private actors rather than a representative sampling of global education, which is overwhelmingly provided by public systems.

IV. The Report's Use of Research Literature

The two research-based sections of this report cover the historical background and case studies of private actors in education. The report notes that it “is not a comprehensive review of the literature or the evidence, although we do cite studies from the leading academics and researchers” (p. 12). There is limited citation and use of leading research in the historical trend analysis, but it is largely missing in the case studies.

Historical Review

The historical review points out that while governments have improved access, gender parity, and expenditures in recent decades, the issues of out-of-school students, school completion, services for disabled students, and high-quality learning remain prevalent (p. 25). The citations for most of these issues include data from UNESCO, the World Bank, and international assessments, and identify key problems facing the global education community. According to the report, students will need to go beyond basic literacy and numeracy and acquire digital skills for 21st century economies. While these arguments address real issues, they also present a narrow workforce-production model of education based primarily on assessment scores, a perspective not taken in some of the highest performing countries, as discussed in Section VII below.

It is also important to note that the report does make an unsubstantiated causal claim that the “traditional focus on input-driven public provision of schooling has contributed to low learning outcomes in education systems around the low-income world” (p. 62). While education systems may not have produced sufficient levels of learning – or at least gains in test scores – one cannot causally attribute this to these systems. This is especially true for countries in the Global South navigating structural debt, global inequality, poverty, emergence from colonialism, and myriad other macroeconomic and political issues.

Case Studies

The case study section offers a unidimensional analysis, basing recommendations only on examples with significant roles for private actors. The four programs operate as follows. In Pakistan, three programs using vouchers and direct private-operator support operate in a high-stakes testing and accountability environment. During its recovery from the Ebola outbreak and civil war, Liberia instituted a trial of eight different private providers focused on flexibility, accountability, and measurement. The Philippines received a loan from the Asian Development Bank for the first six years of a voucher program that was later expanded from the primary level to include secondary schools. Finally, an intermediary organization in India was created to facilitate public-private partnerships, functioning as a quasi-governmental entity in administering private-actor involvement.

The report presents these cases as proof of the success of the privatization approach. However, very little evidence is provided to buttress this claim. In the four sections (17 pages) detailing these programs, only one citation is included, to a World Bank study that is not peer-reviewed. While it appears that the report utilizes information from other sources, that information is not identified or appropriately cited, so that the reader might have to read all

45 references to unearth the relevant text. Of the 45 references, only six are peer-reviewed, and only one discusses a case study – Tooley and Dixon’s review in the *Journal of School Choice*.³ The overall lack of justification for the findings makes it impossible to properly evaluate the merit of the argument.

This problem is not unique to the country program evidence. In a section laying out the challenges, the report states that “the argument that inequity increases when alternative providers step in is not supported by evidence. Indeed, the research suggests that focusing on purely public provision delivers outcomes that are both insufficient and inequitable” (p. 12). However, the report offers no immediate citations for this claim and previously references only one peer-reviewed study about inequity (the Tooley and Dixon article). Furthermore, the report also cites a paper contradicting its equity claims. This causal inference study of districts in India states that:

While our results identify a potentially effective role for the recognised private unaided schools for securing higher literacy and enrolment, there is a need to look after the interests of the poor and the marginalised (e.g., female and low caste population) who are likely to be disadvantaged under private provision of basic schooling.⁴

This contradiction is problematic not only at the level of evidence, but more importantly because the most disadvantaged groups can become even more disadvantaged with the deployment of programs including private actors.

The broader literature shows that inequity increases when alternative providers become involved. An entire recapitulation of school choice research is not possible here, but substantial evidence shows increasing inequities as private-actor involvement increases. In the U.S. context, Levin showed 20 years ago that education choice correlated with increased segregation.⁵ More recently, Carnoy and Welner have aggregated voucher and neovoucher research, respectively, showing that voucher programs do not consistently correlate with higher achievement and can contribute to inequities in education.⁶

Charter school research also shows evidence of “cream-skimming,” where charters enroll students who differ from their peers who remain in public schools in ways sometimes unaccounted for analytically.⁷ However, other studies contest these findings.⁸ Internationally, a recent 17-country quasi-experimental study also found that public-private partnership schools (the international term for charter schools) sort for more academically prepared students.⁹ Overall, the failure of the report to follow scientific convention, accurately state research claims, or cite appropriate evidence – while claiming to be evidence-based – does not imbue the reader with the necessary confidence to embark on the recommended large-scale education changes, especially increasing private-actor involvement.

V. Review of the Report's Methods

This report does not present original research; instead, it appears to be a policy advocacy white paper. As such, its methods include: political issue framing and reviews of empirical evidence, as well as recommendations derived from these activities. Previous sections discussed the recommendations and the nature of the evidence, so only a few key points remain to be highlighted after a discussion of the political framing.

Political Framing

At the political framing level, the report begins with forewords by two government officials, both of whom have supported increasing the role of private actors in education. The first, by Sir Michael Barber, highlights the authors' claim to leave ideology behind in favor of presenting evidence and focusing on outcomes and results rather than inputs and structure (p. 6). The authors repeat this non-ideological trope throughout the report, such as when framing the drive delivery model as an example of "school choice" in which governments should "regulate to promote ecosystem growth but more or less stay out of the way of the private sector" (p. 68). However, these discussions do not mention the ideological root of the theory that markets function more efficiently than governments.

The history of this idea dates back to Milton Friedman (an original voucher proponent), further back to Friedrich Von Hayek (a "free market" advocate), and even further to Adam Smith (coiner of the phrase "the invisible hand," referring to market-based efficiency).¹⁰ The report attempts to rewrite the centuries-long history of "free-market" ideology as non-ideological, thereby implying that support of publicly funded and delivered education is the only ideological position. By not acknowledging the ideological roots of the preference for private-actor involvement, the report diminishes the credibility of its methodology.

The second foreword is penned by George Werner, a former education minister of Liberia, who introduced the field trial of public-private partnerships in Liberia (p. 8). Mr. Werner publicly called for exporting charter schools to the developing world during a presentation at the American Enterprise Institute in Washington D.C. (a "free enterprise" institute).¹¹ In the foreword, he explains his rationale for experimenting with low-fee private schools, writing that "the private sector knows what it wants and is willing to make decisions quickly" (p. 9). This statement reveals multiple problematic political issues. Traditionally, what the private sector "wants" is profit, a stance that can be at odds with the requirements and responsibilities of public sector provision. Making decisions quickly can shortcut democratic input and feedback from education stakeholders and families. Finally, the sentiment embedded in Werner's comment portrays the private sector as efficient, although claims of efficiency by private actors delivering education have often not held true, as when their entry fractures the economy of scale of public education sectors.¹²

The report states that "more than anything, the system we advocate here is simply one that uses evidence instead of ideology, wherever that evidence points," (p. 92) but it does not deliver. Indeed, at key points in the report, anti-government ideology is clearly present. The report asserts, "we aim to show that it's impossible to expect that only focusing on govern-

ment improvement will meet the needs of all families” (p. 24). In describing the institutional entity supporting private schools in India, the report explains that “[t]he Education Alliance [TEA]. . . believes in the power of well-structured public-private partnerships to move government schools from access to quality” (p. 56).

In addition to the report’s ideological bias, it also details direct political influence by the private actors. Describing the TEA’s approach, the report states that “after lobbying, TEA was able to secure the operator’s ability to formally ‘censure’ teachers for poor performance and request their transfer” (p. 57). The enactment of political agendas goes beyond the framing of a perspective and includes the authors and funders themselves. The report’s authors describe themselves as having “invested in for-profit education companies and school chains serving children from low-income families in the emerging markets. . . We are non-ideological and support all types of schooling that deliver outcomes” (p. 10). The only entity cited as a funder of the report, the Omidyar Network, states on its website that “we believe that markets and technology can be forces for good but only as part of a broader social contract.”¹³

Finally, the report discloses that the Omidyar Network is an investor in Bridge International Academies (BIA). Before committing to a field trial of eight private operators, Liberian Minister Werner (discussed above) originally planned on

outsourcing 50 schools to Bridge International Academies, a US-based for-profit provider of low-cost education. . . . If successful, many, or even all, of Liberia’s schools could be outsourced to the same company.¹⁴

The report does briefly mention this initial plan and the resulting international backlash, revealing that “even still, Bridge International operated by a different set of rules that created challenges in terms of measuring the program in the first year” (p. 74). Thus, while claiming a “non-ideological stance,” the report actually presents a clear free-market perspective shared by the authors, funders, and actual participants in the studies cited as evidence.¹⁵

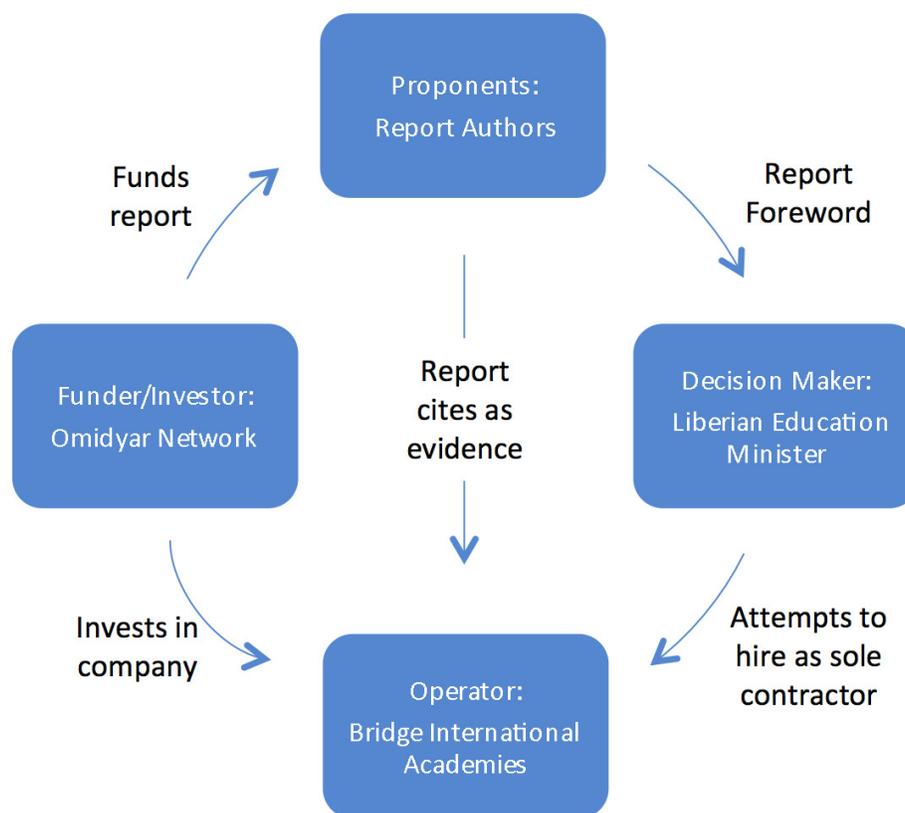
Lack of Evidentiary Support

Even ignoring the ideological political framing discussed above, the level of the case study evidence itself is not sufficient to support the scale of the policy recommendations. The sections above outlined the paucity and lack of consistency of the evidence provided. Within that evidence, the description of Liberia’s program states that “beyond just the difficulty of gathering data, separating the effects with small sample sizes and very different implementation paths led to conclusions that could best be described as suggestive at this point” (p. 51). Yet the very next sentence of the report discarded that cautionary note, asserting that “caveats aside, the program demonstrated significant promise.” The same issue reappears in the discussion of the program in India, with the findings reported as “obviously preliminary, but. . . enough to show significant promise that the innovations these new operators bring hold potential within the government system to improve results” (p. 60). For two of the four programs, the evidence remains “suggestive,” “preliminary,” and shows “promise,” all of which is not an appropriate empirical threshold for a foundational shift in global education governance.

Broader Picture

Taken as a whole, the report authors, governmental officials, evidence, and funders coalesce into a closed-loop ecosystem of education privatization. Figure 1 shows the actors and evidence within that ecosystem, as well as their relationships. These relationships, particularly the funding relationships, represent conflicts of interest that are inappropriate for scientific empirical research intended to undergird a global educational shift. While the report does mention the funding conflict, it does not change the fact that the funders have a material interest in a report that presents their investment (e.g., Bridge International Academies) in a positive light. On the one hand, the report does receive a vote of confidence from the former Liberian minister, but, as discussed above, he has already expressed his interest in private-actor involvement in education, rendering any sense of scientific objectivity invalid. The closed-loop system described here is a micro-level version based on this report; many macro-level analyses explain the intersections of ideology, actors, and funding within education privatization networks at the national and supranational levels.¹⁶

Figure 1. Closed-Loop Education Privatization Ecosystem of Proponents, Decision Maker, Operator, and Funder



Important Issues and Recommendations

In addition to the recommendations already summarized, the report also addresses three key topics that merit mention: accountability, (de)regulation, and scalability. The report repeatedly states that education systems should be structured based on evidence and out-

comes, such as test scores. Over the past two decades, a high-stakes summative testing and accountability system in the United States has not been accompanied by improvements to the achievement gap across all subgroups (it has for some groups, but has gotten worse between others).¹⁷ This time period has, however, seen a cottage testing industry evolve into a global marketplace with large corporations such as Pearson PLC earning a pre-tax profit of USD \$650 billion in 2018.¹⁸ The three authors (who have all worked for Pearson) recommend in this report the expansion of an accountability model that has not correlated with reducing educational inequities for the past twenty years.

Within this broader accountability framework, the report recommends the (de)regulation of education policies. (De)regulation appears in parentheses throughout this review because the report encourages increasing strict regulations on outcomes while simultaneously deregulating inputs, loosening rules about school providers and teacher certification. The report recommends “allowing for broad-based entry of providers by limiting entry costs and requirements so that innovations can be introduced to the system,” again referencing a popular but unproven ideological point that the private sector innovates better than the public sector (p. 66). For teachers, the report states that education systems “could require teachers meet certain basic requirements to protect students, while not mandating full accreditation. . . . Further, young teachers can also demonstrate that they are in progress towards receiving qualifications within a stated time-period” (p. 71).

This model bears the same hallmarks of the emergency credentialing found in Teach for America and Teach for All programs, for example. This approach ultimately opens the classroom door to un- or under-prepared teachers who are cheaper to employ but whose presence results in an overall de-professionalization of teaching at the very moment when global attention should be shifting, according to this report, from education access to improved quality of education.

Finally, the report addresses a third important issue, scalability. Public sector education functions as a collective social agreement that tax dollars should be invested in the future of society through education. The introduction of the private sector complicates many aspects of this agreement. The report, to its credit, acknowledges that private sector funding has created a program for only some students for a significant investment of resources, that in India,

As with other case studies highlighted here, the biggest question mark for the SQEP program is the scalability. Given the importance of donor funding to this initiative and the lack of a plan for government capacity or funding to be a long-term driver of the program in Delhi, it is difficult to see a path to having this initiative cost-effectively reach millions instead of thousands of students. (p. 60)

This disclosure of the often unscalable expense of private-actor involvement reveals that the purported greater efficiency of the market-based model does not always translate to the broad demands of serving all students, especially if subsidies from private funders disappear. The report does not offer viable solutions for financing these programs that would be cost-prohibitive when scaling-up, even while recommending the expansion of the model.

Alternatives

Only towards the very end of the report does the question of different approaches appear, and that discussion is brief, although it merits much more attention. When discussing international examples, the report mentions two different types, but without discussion of either the specific cases or the implications for the role of private actors in education. First, the report mentions countries with full-scale privatization, such as Chile and the Netherlands. However, it does not discuss the level of inequality that has accompanied the national voucher program in Chile in place since 1980, leading one researcher to label it an “apartheid” education system.¹⁹

Second, the report mentions that “some education leaders we have worked with point to countries with high PISA scores like Finland, Korea, and China and argue that public providers account for the vast majority of provision in these systems” (p. 93). However, the report glosses over Finland and points out the role of shadow schooling (formalized tutoring) as an example of private-sector involvement in Asian countries in particular. Yet Finland has consistently been a top performer on international assessments while having a system that rarely tests students, focuses on whole-child, funds the teacher labor force as professionals, and has almost no private involvement.²⁰ For the past two decades, Finland’s success has attracted policymakers worldwide who want to learn how to improve the quality of their education, yet Finland’s successful strategies run contrary to most policy recommendations levied in this report.

VI. Review of the Validity of the Findings and Conclusions

This report correctly identifies a critical issue facing education globally – that of educational quality. However, the roles of education as a social and public good, as well as its potential contribution to a higher quality life, remain unaddressed in the report in favor of a focus on outcomes and test scores. The report recommends a layered approach to solving the quality problem, from adopting a stewardship model at the top levels of government to (de)regulating the system to increasing the role of private actors in some or all aspects of education provision.

The evidence for such a fundamental shift should be vast, rigorous, and systematically presented; it is not. The report lacks adherence to scientific methods for presenting and citing research and making claims which are justified by the presented research. The report’s facade of being evidence-focused and non-ideological is belied by the closed-loop education privatization ecosystem that forms the relationships between the report’s authors, government officials, evidence, and funders. As such, the report’s narrow focus on private-actor solutions reveals a clear ideological agenda favoring education privatization, unsubstantiated by the research presented.

VII. Usefulness of the Report for Guidance of Policy and Practice

The report begins and ends with the story of an imaginary education policymaker facing the urgent need for action in the education sector. While the urgency of the story is real and the problem of education quality is well identified, the proposed solution of increased private-actor involvement remains empirically unproven in this report. Instead of presenting a rigorous case for governments and ministers ceding management of their education sectors to private entities, the connections between the report's actors reveal a strong ideological bias towards private-actor involvement without an appropriate or robust evidentiary base for the policy recommendations. Education ministers should take the suggestions in this report with a grain of salt and instead do their own investigations into the features of high-quality education systems to glean strategies that might actually deliver quality in education within the near-term timeline that faces the children in their countries.

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