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**Forum paper:**

**The rise of international large-scale assessments (ILSAs) and rationales for participation**

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## **A framework for analysing the multiple rationales for participating in international large-scale assessments**

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### **Introduction**

The significant growth of international large-scale assessments (now widely referred to as ILSAs) since the mid-1990s, and the equally significant increase in the number of countries participating in these assessments, begs for scholarly investigation. In order to understand what has driven the development of the ILSA phenomenon and the reasons why countries participate, this paper introduces the history of ILSAs and then discusses a framework developed by Addey and Sellar (2017), which outlines different rationales driving ILSA participation. This section is the main contribution to this forum paper which includes responses from key scholars in the field (Steiner-Khamsi, Lingard and Verger). These responses extend the framework by introducing additional theoretical resources and identify how the framework could support, and be revised through, further research.

The first claim of this paper is that the growth of the ILSA phenomenon must be understood in light of the shift in assessment culture that occurred in the 1990s at the OECD and the IEA, mainly under U.S. pressure (Martens 2007, Pizmony-Levy 2013, Addey forthcoming). Second, this growth has taken place in a global education policy space that has become dependent on comparative performance data (Novoa and Yariv-Mashal 2014). However, the growth of the ILSA phenomenon cannot be understood without examining the diversity of specific reasons driving country participation in particular cases.

Examining the localised meanings that ILSAs are given in each context can help to deepen our understanding of the central role that ILSAs now play in epistemological and infrastructural global governance (Sellar and Lingard 2014). As an element of epistemological global governance in education, ILSAs generate internationally comparable evidence for policy and shape how education is understood and valued across nations. Participation in ILSAs also entails the development and extension of a global infrastructure for generating, managing and analyzing commensurate data across national and sub-national education systems. ILSAs have become an important element of global governance in education by joining up the measurement of educational performance and reinforcing the view that comparison of this performance is important for economic and education

policy making. This paper aims to deepen the analysis of these governance mechanisms by providing a framework for examining the details of participation in specific cases.

### **A brief history of ILSAs**

Empirical research carried out by Martens (2007) and Pizmony-Levy (2013) has illustrated how the main organizations responsible for developing and administering ILSAs—the Organisation for Economic Cooperation and Development (OECD) and the International Association for the Evaluation of Educational Achievement (IEA)—experienced a shift in their assessment culture in the early 1990s, before the ILSA phenomenon fully emerged in the form it takes today. Prior to this assessment culture shift, the approach to international assessments at both the OECD and the IEA acknowledged education system differences, was driven by intellectual endeavor and research questions, and focused on in-depth studies of single educational systems through research-driven large-scale studies on a broad range of school subjects (Pizmony-Levy 2013). Most importantly, macro educational indicators were compared internationally, but international educational performance comparisons were treated with skepticism. Indeed, the IEA warned against such comparisons (Pizmony-Levy 2013) and the OECD specifically avoided encouraging them (Martens 2007).

This all changed during the 1990s. Skepticism toward comparative performance data, and philosophical doubt about the viability and value of ILSAs, gave way to growing emphasis on quantitative data analyses (Henry et al. 2000). In other words, international assessments and data that enabled educational performance comparisons were increasingly accepted and understood as essential for policy making, benchmarking progress, setting standards, and policy learning. Addey (forthcoming) argues that without this shift in assessment culture at the IEA and OECD, ILSAs could not have become a global phenomenon characterized by a growing number of ILSAs, an increasing number of participating countries, and education policy reforms being evaluated, justified and shaped by ILSA rankings and average scores. So, how did this shift occur?

Trohler (2013) argues that the ILSA phenomenon is rooted in the legacy of the Cold War, when two competing political, economic and ideological models were determined to show supremacy, not least through their education systems (e.g. the educational crisis in the U.S. following the Soviet launch of the satellite Sputnik). With the fall of the Berlin Wall in November 1989, a single process of economic globalization, led by the U.S., increasingly framed education as an economic resource in which countries must invest to drive economic growth and global competitiveness. As argued by Hamilton and Barton, the development of ILSAs was driven 'by the

search for universals in the relationships between literacy, education and prosperity' (2000: 378). Education became a global currency as knowledge economies grew and measuring the learning outcomes of a country's education system was seen as desirable in order to quantify its economic potential. Although the shift occurred against this historical backdrop, Martens (2007) and Pizmony-Levy's (2013) research suggests that it specifically resulted from US pressure to develop an indicator culture. Pizmony-Levy (2013, 2015) shows how, in 1990, the U.S. National Center for Educational Statistics (NCES) pressured the IEA to develop their Trends in International Mathematics and Science Study (TIMSS), which would allow the U.S. to compare their educational performance against other countries, in return for financial support. Elsewhere, Pizmony-Levy (2014) highlights the politicization of ILSAs as the IEA's governing body transitioned from representation of research-affiliated individuals to government-affiliated individuals during the 1990s, changing the very aim of ILSAs. In 1987, the U.S. (threatening to withdraw funding) and France (with the intention to use the data to create a scandal that would justify the need for educational reform) pressured the OECD to develop internationally comparative educational indicators, resulting in the establishment of the OECD's Indicators of Education Systems (INES) programme in 1988. However, as Martens argues, 'while the OECD was forced into the game of developing international [rankings and ratings] by dominant states out of rational reasons, it gradually took over the task and developed comparable, easily digestible international statistics and indicators on the basis of its own perception, which today are seen as international standards' (2007: 49). Sellar and Lingard (2014) add that, as a result of this pressure to become a global centre for educational data, the OECD discovered a new role for itself and has since actively sought to expand its work in this area. Finally, to understand this shift in assessment culture it is important to note that, following the Jomtien Education for All conference in 1990, UNESCO, including its Division for Statistics (which became the Montreal-based UNESCO Institute for Statistics in 2001), was challenged by the US, which acted through the legitimacy of the Board on International Comparative Statistics in Education (BICSE) to question UNESCO's capacity to validly monitor educational progress. In the early 1990s, UNESCO found itself without statistical legitimacy in education, whilst the IEA and the OECD were busy developing ILSAs that would dominate the generation of international comparative performance data in the decades to come.

The OECD implemented the International Adult Literacy Study (IALS) for the first time in 1994 and began developing PISA in 1997 for its first implementation in 2000. The IEA implemented TIMSS for the first time in 1995. Three regional large-scale assessments were also developed and first implemented during this period: UNESCO's Regional Bureau for Education in Latin America and the

Caribbean assessment coordinated the Latin American Laboratory for the Evaluation of Educational Quality in 1997 (the first test is known as PERCE, followed by SERCE in 2006, and TERCE in 2013); the Southern and Eastern Africa Consortium for Monitoring Educational Quality (known as SACMEQ) conducted its first assessment in 1995; and the Conference of Education Ministers of Countries Using French as a Common Language implemented the Programme for Analysis of Education Systems in French-Speaking Countries (known as PASEC) in 1991.

Although initially developed for higher income contexts, ILSAs increasingly target low and middle income contexts in order to measure learning outcomes on the same global metrics (Bloem 2015b, Rose 2015). During the 2000s, TIMSS and PIRLS saw an increase in the number of participating countries, whilst the OECD redeveloped its IALS programme into the Programme for International Assessment of Adult Competencies (PIAAC). PIAAC is now being implemented in over 35 countries, across three rounds taking place between 2008 and 2019, and the OECD is calling for middle and low income countries to join. In 2003, the UNESCO Institute for Statistics (UIS), a latecomer to the ILSA landscape, began developing an IALS-equivalent assessment, the Literacy Assessment and Monitoring Program (LAMP), to assess literacy and numeracy skills across a greater variety of languages, cultures, scripts and numerical systems (Guadalupe 2015). The programme had poor political support, suffered many staff changes, and faced many methodological and conceptual challenges. In the world of ILSAs, LAMP never gained sufficient global prestige and, although its aims were timely in 2003, the OECD's programmes have now become more attractive in low and middle income countries. In 2012, the OECD redeveloped PISA into PISA for Development (PISA-D) to make the PISA instruments more relevant to low and middle income countries.

The development of new ILSAs has not slowed: in 2016, the OECD already had five countries signed up to implement its new early learning ILSA aimed at five year olds (OECD 2015). As of 2016, the European Union is also developing an international assessment to measure the outcomes of tertiary education, a programme known as CALOHEE, which stands for 'Measuring and Comparing Achievements of Learning Outcomes in Higher Education in Europe'. CALOHEE will assess the performance of bachelor and master students in Engineering (Civil Engineering), Health Care (Nursing), Humanities (History), Natural Sciences (Physics) and Social Sciences (Education) across Europe.

Over the last fifteen years, the ILSA phenomenon has changed education policy processes whilst education actors globally have reframed their values, beliefs and work programmes around the role and outcomes of these assessments. Recent developments in ILSAs appear to be taking

comparisons a step further, although questions remain about the validity of international performance comparisons. For example, while PISA claims to provide countries with an objective evidence-base for policy, Bloem (2015) shows how the OECD went from producing and analysing data during the first two PISA implementations, to interpreting the data and producing recommendations in order to increase the policy relevance of its assessments, thus placing itself at the centre of PISA's global epistemic community (Haas 1992). Through the PISA for Development experience, the OECD has also become aware that, in order for their ILSAs to impact on policy and practice in low and middle income contexts, the implementation support and policy learning packages they offer are not sufficient. Local cultures of assessment must also be changed.

The OECD's transformation from philosophical doubt to confidence (Henry et al. 2001) in measuring educational performance has also been the story of a global education policy space that has become dependent on comparative performance data (Addey forthcoming; Novoa and Yariv-Mashal 2014), thereby making all those who seek a voice in the global education agenda dependent on, or at least required to acknowledge, international performance comparisons. However, this brief ILSA history does not explain why so many countries participate, thus transforming the shift in assessment culture that began within international organisations into a global phenomenon shaping assessment cultures within nations. We thus turn our attention to some of the reasons why countries participate in ILSAs and argue that examining the great diversity of purposes that ILSAs serve can help to explain their rapid growth.

### **Rationales for participation**

This section provides a discussion of rationales for participating in ILSAs using an analytical framework developed by Addey and Sellar (2017). The framework was developed inductively from analyses of empirical data from three separate studies of ILSAs – all claims made in this section are derived from these studies. The first study examined developments in education policy globally, with a focus on PISA, and included more than 50 interviews from 2011 to 2014 with policymakers, analysts and senior managers in Australia, England and at the OECD<sup>1</sup>. The second study examined the participation of lower-middle income countries in ILSAs using case studies of LAMP in Laos and Mongolia, and included approximately 30 interviews conducted in 2012 in Laos and Mongolia and

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<sup>1</sup> The Discovery Project (DP1094850) titled *Schooling the Nation in an Age of Globalisation: National Curriculum, Accountabilities and their Effects* was funded by the Australian Research Council. The chief investigator of this project was Professor Bob Lingard and it was based at The University of Queensland.

at the UNESCO Institute for Statistics (Addey 2014). The third study focuses on changing global policy actors and policy processes in Ecuador and Paraguay through the development and implementation of PISA for Development<sup>2</sup>, and included approximately 20 interviews conducted in 2015 and 2016 at the OECD, at The Learning Bar<sup>3</sup>, and in Ecuador and Paraguay. Each of these research projects used semi-structured interviews as the primary mode of data generation. Data were also collected in the form of ethnographic notes while participating in seminars and conferences with policymakers, technical experts and academics involved in developing, researching and using ILSAs. Limitations of space mean that this paper is not data-rich and more extended analysis (including interview extracts) is undertaken in Addey and Sellar (2017).

The paper does not differentiate between what interviewees say are the rationales for participation and actual uses of ILSAs; nor does it differentiate between official and non-official rationales for participation. The authors do agree, however, with Steiner-Khamsi's (see below) suggestion that there are rationales that pass the official version whilst others are considered taboo.

The framework includes seven broad rationales for participation: generating evidence for policy; technical capacity building and developing national assessments; receiving funding and aid; enhancing international relations; responding to or driving national political agendas; driving economic growth; and informing curriculum and pedagogy. International organizations administering ILSAs claim that ILSAs provide countries with evidence for policy and technical capacity building opportunities (i.e. OECD 2014, UIS 2004, IEA 2015). These two could be considered rationales which pass the official version for participation. Here we describe how different combinations of rationales have led different countries to participate in ILSAs such as PISA, LAMP and PISA-D. The analytical framework is designed to support further theorizing and research in relation to the roles that ILSAs now play in the global governance of education.

### **Evidence for policy**

Organizations that develop, administer and lobby for the implementation of ILSAs claim that assessment data provides reliable evidence for policymaking and enables the evaluation and benchmarking of educational performance (OECD 2014, UIS 2004, IEA 2015). The rationale of generating data for policy is widely adopted by politicians and policymakers. However, policies

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<sup>2</sup> This research project, called P4D4Policy, is supported by the Fritz Thyssen Foundation.

<sup>3</sup> Private, Canadian company contracted to develop the PISA for Development background questionnaires.



developed in relation to ILSA data are not necessarily informed by careful analyses of the data, but instead draw on average scores and rankings to construct political narratives that legitimize reform or the status quo.

The use of ILSA data as evidence for policy is often linked to the performance of reference societies, the relative positions of countries in the rankings, and the improving or declining ranking or performance of a given country. Governance by comparison may emerge where particular policy agendas are adopted under peer pressure to compete and conform with top performing countries (Martens 2007, Grek 2009). Top performers may also become reference societies from which others borrow policy (Steiner-Khamsi and Waldow 2012). Rankings may create ‘shocks’, which open windows for policy reform, when performance does not match expectations and is seen to be an important issue nationally (Ertl 2006; Martens and Niemann 2013; Wiseman 2013). Attention to movement in the rankings may drive national narratives of improvement or decline (Sellar and Lingard 2013). Finally, the desire to improve may drive changes to educational curricula and national tests to increase performance in the skills tested. ILSA data are thus seldom used as evidence for policy in ways promoted by organizations administering the tests—that is, by drawing lessons from what the data can be interpreted as showing at a national level—but instead are often used to legitimize reform or inaction that is more closely tied to internal political agendas and participation in international communities.

### **Technical capacity building and national assessments**

Empirical data suggests ILSAs are considered an opportunity to acquire innovative and sophisticated statistical methodology (e.g. Item Response Theory). Indeed, participation is often justified in relation to a building such capacities, and this tends to be conceived as a technical process that does not involve an allocation of values. Capacity building in psychometrics has been a rationale for higher income countries (e.g. France) as well as low and middle income countries. The capacity built through participation can be undermined by changes of government, which may result in changes in the government bodies where education evaluation staff work.

Capacity building rationales are closely linked to the status of national assessments in a given country. There is strong view put to participants in ILSAs, by administering organisations such as the OECD, that both national assessments and international benchmarking are needed to adequately monitor educational performance. Participation in ILSAs may be seen as desirable when national assessment programmes have not been developed or are of poor quality. In other cases, national assessments may be revised to align with ILSAs or national assessments may be developed based

on ILSA frameworks and methodologies. For example, in Ecuador the results of PISA-D have been described as a way to legitimize national assessment instruments since they were developed using the PISA assessment frameworks as a reference point. This is an important case of PISA impacting education practice before participation, a dynamic that is likely to become increasingly frequent amongst late comers to ILSA participation.

### **Funding and aid**

Participation of low and middle income countries in ILSAs is often linked to funding and aid conditions. Staff from international aid agencies often describe low and middle income country participation as being driven by donor encouragement (Lockheed et al. 2015). However, empirical data suggests low and middle income countries do not passively take part in ILSAs to access funding without being driven by a more complex ensemble of rationales. For example, Mongolia participated in TIMSS 2011 with World Bank funding but returned the funding after the pilot phase when the government decided it no longer suited its agenda.

Participation fees and implementation costs in low and middle income contexts are frequently covered by international donors or bilateral aid schemes. Donors often require ILSA data as a benchmark to demonstrate educational progress and, in a less direct manner, ILSAs are used to display commitment to accountability and transparency, which can increase countries' donor approval. ILSA data are also used as evidence to obtain funds for education activities (this is a 'scandalization' use of ILSA data to highlight system weaknesses) and are likely to become a key criterion guiding the allocation of funding (i.e. PISA-D data are likely to be used to allocate or obtain funding linked to the Sustainable Development Goals).

### **International relations**

Empirical data shows that participating in ILSAs is rarely only about education. Indeed, participation in ILSAs, which is often assumed to be about improving learning and teaching, has actually become a powerful global political requirement that countries can rarely afford to ignore. Countries may participate as part of a broader nation building narrative; to make a statement about political or economic status; to align their values with an international community; to access to political, economic or trade entities; or, due to pressure to participate as signatories of global commitments. Countries often participate as a duty or responsibility and in some cases non-participation may not be a real option, even when data is not relevant to a country's specific education challenges. For example, high level policy actors in European countries have argued that economic status imposed participation and that non-participation would send a signal that a country

was not sufficiently committed to improving education. An increasing number of countries whose participation has not led to improved results are seeking arguments to drop out, but feel obliged to continue participating.

International relations purposes for participation include factors related to membership in international organizations that administer ILSAs or initiatives which have been pledged by countries (e.g. Mongolia was a key player in the UN Literacy Decade - the framework within which LAMP was developed). In such cases, participation may be valued as a process over and above the value of the data that are generated. When participation is about the 'club' that a country joins, participation becomes a 'global ritual of belonging' (Addey 2015) which involves adopting values and entering social projects which put countries 'on the map' (Grek 2009). For example, in Paraguay participation in PISA-D enabled entrance into a global community (described as its first relationship with the OECD), ending a form of self-exclusion from processes for generating education data which was described as unbearable. Not only does Paraguay's participation in PISA-D substantiate the global ritual of belonging, but high level policy actors are honest about the importance of belonging to this community in political terms, which then needs to be publicly justified in technical and educational terms in the media. Closely linked to the global ritual of belonging is the use of international assessments to generate national statistics with a global stamp of approval and to obtain recognition in the eyes of the international community (e.g. UNESCO's General Conference approving Palestine as a Member State, the government of Cyprus sending a signal to the Turkish government which occupies the Northern part of the island). Participation may also be seen as enabling entry or improving chances to enter political entities (e.g. Turkey applying to enter the European Union).

### **National politics**

Empirical data suggests participation may be prompted by pressures associated with national politics. These pressures may come from ministries and institutions not directly related to education. Participation can also be a response to special interest lobbies (e.g. French banks lobbied for France to take part in the 'finance literacy' section in PISA), media pressure or public opinion. Where forms of New Public Management (NPM) have been implemented, ILSAs can be used as regulatory tools to measure progress towards performance targets. Scandalizing comparatively 'bad' data can be a means for political parties to win support or put the spotlight on weak performance and discredit opposing political groups (Addey 2015; Steiner-Khamsi 2003). Participation in certain ILSAs may be taken for granted by governments and political parties whose

agendas align with values underpinning ILSAs and new governments may withdraw or differently emphasize participation to create a point of distinction from previous governments. For example, the Coalition government elected in 2010 in the UK has given greater emphasis to international data than previous Labour governments.

The tactical use of international data to respond to domestic political agendas by ‘glorifying’ education performance can be observed in the form of the statistical elimination of educational problems (Steiner-Khamsi and Stolpe 2006). For example, the shift to the measurement of literacy as a continuum - from poor literacy to proficient literacy - avoids the concept of illiteracy by focusing on the lowest level of literacy. Mongolian policy actors capitalized on this shift to argue that LAMP met the country’s need to improve ‘bad’ numbers (i.e. high adult illiteracy rates) which appeared in the 1990s. In other contexts, such as Australia, PISA has been used to ‘scandalize’ a decline in the rankings. As discussed above in relation to the use of ILSA data as evidence for policy, movement in the rankings is often mobilised to justify national political agendas for education reform.

### **Economic competitiveness**

ILSAs may be seen as instruments for measuring human capital and as providing proxy indicators for economic competitiveness and attractiveness to the corporate world. The causal relation between education and economic performance is widely made – although correlations between ILSA scores and national economic growth have been called into question (Kamens, 2015; Klees 2016). ILSA data, particularly data generated by OECD programmes such as PISA and PIAAC, are used to represent skills pools and labour competitiveness in order to attract investment. Indeed, PISA is primarily designed as a measure of human capital flows at the end of compulsory schooling. In a recent interview<sup>4</sup>, Andreas Schleicher, Director of Education and Skills at the OECD, argued that even poorer countries like Brazil need to measure their skills using PISA since globalization means all workers are competing against workers globally. ILSAs have thus become an important instrument within what Brown and Tannock (2009) call the global war for talent—the competition between nations for the most valuable human capital. The OECD has positioned PISA as the best instrument that countries can use to measure how well their education systems prepare students to compete for jobs globally and to identify the best policy solutions for training the most competitive workers.

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<sup>4</sup> This is an interview carried out in 2015 as part of Addey’s PISA4D4Policy research project.

## **Curriculum and pedagogy**

The rationale of improving teaching and learning is rarely mentioned as a primary driver of participation in ILSAs. This may be a result of PISA becoming the most prominent ILSA. Whilst the IEA's TIMSS and PIRLS measure how well students have acquired the curriculum that is taught, PISA measures the capacity to apply skills learnt over the first 15 years of life. There is thus only a loose relation between curriculum and PISA performance.

When participation is described as a strategy for informing changes to curriculum and pedagogy, these changes are often associated with a desire to improve test-performance or responses to internal political agendas. Technical questions about how ILSAs can sensibly inform better teaching and learning practices are increasingly being voiced by those concerned that resources invested in ILSAs give something back to education at the classroom level. However, in the case of PISA it is not clear how ILSA data could sensibly inform changes at this level.

## **Conclusion**

Understanding how ILSAs have developed and why participation has grown so rapidly requires analysis of the meanings they acquire in each national context in order to deepen understanding of the role that ILSAs play in global governance in education. ILSAs are constituting a new mode of infrastructural governance as they spread capacities to generate, collect, manage and analyse education data across countries around the world (Sellar and Lingard 2014). This infrastructure 'joins up' national assessments of education and lubricates the global governance of education through comparisons of national performance (Novoa and Yariv-Mashal 2014; Woodward 2009). Moreover, by participating in ILSAs, countries demonstrate that they share the values of an international community (cognitive governance) and produce evidence and knowledge for policy making (normative governance). Participation thus also facilitates modes of epistemological governance that produce alignment of assessment cultures and other educational practices across countries. Although countries participate in ILSAs for diverse reasons, this participation entails consent to common ILSA values of (1) the need for more reliable, comparative data to equip countries for the global economy through quality and equity-driven educational systems and (2), the need to contribute to generating ILSA-based policy knowledge as a member of the international community.

The analytical framework developed by Addey and Sellar (2017) suggests that: (1) participation is rarely driven by one factor alone; (2) the decision to participate has to be understood in the particular context in which the decision is taken; (3) rationales can change not only between

implementations of the same ILSA, but also during the same implementation; and (4) it is not only the gaining of data that drives participation, but the process of participation itself. Rationales for participation are often not discrete and cannot be assumed simply on the basis of wealth, level of development or international relations. For example, participation may be rationalized in terms of ensuring economic competitiveness in the global economy through evidence-based policy, while data are used to push internal political agendas. Alternatively, participation may be justified in terms of participating in an international community and building national assessment capacities, while also being a requirement for the receipt of international aid. There are also cases in which the 'push' to participate can be related to personal political and career agendas.

Although for many countries participation is justified in terms of the dominant narrative of 'better data for better policies', the wide variety of functions which have emerged show that this global phenomenon is much more complex. The rationales for participation outlined in this short paper offer an insight into the complex global education landscape that is being constituted and suggest that the sociopolitical contexts in which ILSAs are adopted are also transforming the intended uses of ILSAs. The diverse rationales for participation show how ILSAs can easily serve multiple purposes and we argue that this flexibility has contributed to the rapid growth of the ILSA phenomenon over the last fifteen years.

This paper has sought to highlight how the various uses of ILSAs make economic and political considerations as important as educational considerations, or perhaps even more important, when decisions are taken to participate in ILSAs. We are left with a number of questions that can be asked about participation. For example, what is the balance between political, educative and technical rationales for participating in ILSAs? Can these different dimensions be disentangled? And to what extent are ILSAs contributing to global education policy becoming an increasingly political and economic matter, rather than an educative one?

## **Focusing on the local to understand why the global resonates and how governments appropriate ILSAs for national agenda setting**

*Gita Steiner-Khamsi, Teachers College, Columbia University*

Arguably, the ILSA analytical framework, developed by Camilla Addey and Sam Sellar, breaks radically with commonsensical explanations of why national policy actors agree to participate in PISA, TIMSS or other international-large scale assessment (ILSA) studies. The most commonsensical ones are lesson-drawing or learning from comparing over time or across educational systems. In contrast, their analytical approach takes into account (i) political, (ii) economic, (iii) social, and (iv) technical dimensions and notably acknowledges that policy actors use ILSA findings for (i) coalition-building or, more precisely, for generating or alleviating reform pressure, (ii) mobilizing financial sources for the education sector, (iii) demonstrating “internationality,” and finally, for (iv) learning technical skills of how to measure student outcomes and system performance. Having examined several countries that participated in PISA, LAMP and PISA-D, Addey and Sellar identify a total of seven categories of reasons that explain a country’s participation in these three ILSAs. Of course, one may contest whether the seven categories really cover the universe of possible motivations for engaging with ILSAs or, at the opposite end, whether—as I would propose—the proposed seven rationales should be grouped in fewer broader dimensions, such as the four suggested above. The benefits of fewer, broader dimensions are two-fold: they would entice researchers to expand the list of rationales for ILSA engagement based on empirical studies of additional ILSAs, (moving beyond PISA, LAMP, PISA-D) and additional country contexts. Nevertheless, listing *different* rationales for participation in ILSAs represents without any doubt a solid foundation for building an analytical framework, for the following reasons.

First, ILSAs have experienced an exponential growth both in terms of frequency with which such student assessments are carried out and in terms of educational systems that participate. They have become polyvalent as a result of this boom. Acknowledging that policy actors engage with ILSAs for different reasons implies that ILSAs *mean* (politically, economically, socially, technically), depending on the context, different “things” to different actors. As Addey and Sellar poignantly remark, the elusiveness of PISA is an asset, not a weakness, enabling a large number of policy actors, spread in every corner of the world, to use it as they see fit. Addey and Sellar’s point that ILSAs resonate for a variety of reasons is well taken. It is furthermore important to point out that the elusiveness of ILSAs is related to the number of educational systems that participate. The greater the number of educational systems or the spectrum of country contexts, the more elusive and

polyvalent do ILSAs become. What is more: the greater the elusiveness, the more attractive do ILSAs become to undecided policy actors, enhancing their chances of participation and so forth. This applies first and foremost to PISA. The strength of PISA is its great number of participating countries, and as a corollary its elusiveness and polyvalence, enabling each and every policy actor to participate in PISA for their own reasons. What also helps in terms of polyvalence is PISA's complete detachment from national curricula and its exclusive focus on cross-national 21<sup>st</sup> century skills. It is a decontextualized measurement to start out with and therefore enables each and every participating government to project their idiosyncratic explanations for their high, average, or low performance, respectively. An analogy to the Lazy S-curve, used in diffusion studies, may be helpful here for purposes of illustration: a "traveling policy" or, as is the case with ILSAs, a "traveling policy tool" becomes deterritorialized and decontextualized at a take-off point, when several countries adopt the policy or the policy tool, respectively. Eventually, it becomes everyone's and nobody's reform at the stage of explosive growth, thereby further increasing its attractiveness to the late adopters.

Second, a case is more than a country. Chile, France, the United States, or any country for that matter, are not actors. But the Government, the Teachers Union, the Testing Industry, or any other community in the respective country with a shared understanding of what an ILSA means to them is an actor. A case in point is the State of Palestine,<sup>5</sup> where government officials use PISA results to demonstrate vis-à-vis the general public the success of their educational reforms, curriculum developers borrow PISA test items to explain to teachers what good student tests should look like, and educational researchers finally show a keen interest in participating in PISA for the sake of their own careers, in particular for their own professional development in the areas of test construction and statistical analysis. The Framework is useful provided that the country is considered a case, rather than an actor, and used to show that there are many different actors, at times with divergent reasons for participating in PISA, within a country that for different reasons embrace participation in PISA. Such a multi-actor perspective would open up a host of fascinating research questions such as, for example, do the responses of national government actors, curriculum developers, and educational researchers differ across countries, which reason for

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<sup>5</sup> This examples draws from the presentation of Mohammad Matar, Palestine Ministry of Education and Higher Education, which he made during the symposium "Learning from Learning Assessments: The Politics and Policies of Attaining Quality Education," held on June 23, 2016, in Geneva and organized by NORRAG, the Center for Universal Education at Brookings and PASEC.



engagement with PISA is considered the norm and passes as the official version, and which rationales are rendered irrelevant or considered a taboo, and why.

Finally, any analytical framework in policy studies—including the one presented by Addey and Sellar—requires a theory of the state in order to understand the idiosyncracies or “socio-logic” (see Schriewer 1990) of the varied motivations for ILSA participation. It is noticeable, for example, that only government actors in specific country contexts appropriate ILSAs as a (quasi-) external stamp of authority to then “scandalize” their own system with the intention of generating reform pressure, mobilizing funds, and building a coalition of reform-minded allies. A good case in point is the 2004 evaluation study of the Danish educational system for which the Government of Denmark contracted OECD (see Brøgger, Pizmony-Levy, Staunæs, Steiner-Khamsi, 2016). Produced by a group of international *and* national policy analysts, the 2004 OECD report set in motion a decade-long debate on the need to revamp the educational system, which eventually culminated in a fundamental reform that went into effect in September 2014. Denmark stands as a case for a country in which civil society is actively involved in educational reform. Any decree undergoes a rigorous, multi-stage stakeholder review, entitled “hearing.” Thus, winning support for a fundamental reform is indispensable. At the opposite end is perhaps Kyrgyzstan where educational reforms are issued by the central government; at best in consultation with the municipal government of the capital city Bishkek and at times in collaboration with the state-affiliated teachers union, but with very little or no input from non-state actors. Kyrgyzstan scored last in the two PISA rounds: in PISA 2006, it was ranked 57 out of 57 countries and in PISA 2009, 65 out of 65 participating countries. The gap in score points between students in Kyrgyzstan and Shanghai-China, the top-performing region in PISA 2009, corresponds to 242 score points or more than six years of formal schooling. Rather than using the poor results as a policy window for resource mobilization or stakeholder engagement, the government blamed the independent research think tank for the poor results, strengthened its own, government-affiliated agency in charge of standardized testing, and discontinued its participation in PISA. Clearly, in the absence of pressure from civil society *and* in the strong interest for political continuity, a Statist approach to agenda-setting (as seen in Kyrgyzstan) does not need OECD to justify the need for national reform. As is the case everywhere else too, reforms in Kyrgyzstan are supported by some, and opposed by others. However, the contestation does not lead to an inclusive policy process in which the government is under public pressure to justify its policy decisions. To conclude, what would be useful in such a framework is a theory on the role of the state in the policy process (see Verger’s response below) that would

explain, among other important things, why national actors prefer one reason of participation over six or more other reasons for engagement with PISA.

Clearly, the ILSA analytical framework is an invitation to researchers to investigate the local meaning(s) of ILSAs which, over the past decade or so, has attained global status as a policy tool. From a systems perspective, it is not only polyvalent, meaning different “things” to and fulfilling different agendas for different actors, but it is also polyglot: ILSAs speak the language of accountability used in (new) public management, the language of standards advocated by the private sector and non-state actors, and last but not least the pedagogical language of effective learning spoken by educators (see Steiner-Khamsi, 2015).

**A response to the rise of international large-scale assessments and the reasons for participation**

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Addey and Sellar have provided an insightful analysis of the growth in significance of ILSAs from the 1990s. An important factor here was the strengthening of an assessment culture in the OECD and IEA at that time, under pressure from the USA. Since then there have been successful moves by the OECD to expand the scale of participation in ILSAs, especially PISA. Addey and Sellar also document national rationales for participation in ILSAs through the creation of a heuristic typology. As they note, empirical work is needed in respect of the specificities of any participating nation's rationale. The rationales are usually hybrid mixes of these and change over time, as well as serving different political purposes.

In addition to the necessity of granular empirical work, there is also a need to theorise across the typology. As an example, consider the rationale of belonging to the international community of nations, where participation itself is its own rationale. We might begin to understand this rationale through neo-institutional or global polity theory: the global dispersal of a kind of Weberian technical-rationality as a demonstration of the modernity of any given nation. A weakness of the neo-institutional approach is neglect of actors in diffusion and acceptance of modernity and of power relations. In these processes, policy actors are important and strengthen rationales for participation over time, as we witness an alignment of policy habitus of international and national policy makers through an epistemic community linked to an emergent global education policy field, with field here theorised within a Bourdieusian framework (Lingard et al., 2015). This latter work also provides potential theoretical insights into national rationales for participating in ILSAs. Theoretical work on policy borrowing (and learning) would also offer another way to add a theoretical dimension to the Addey and Sellar typology.

While national rationales are important, the changing rationales of international organisations for ILSAs are also important, if we want to document, understand and theorise the impact of these tests at any moment in any given nation. The impact of ILSAs manifests through a frisson between these programs and national rationales. International organisation rationales will be considered here through a brief case of the OECD's PISA as a necessary complement to consideration of national rationales for participation in ILSAs.

There have been PISA shocks over time with the reaction in Germany following the first PISA in 2000 providing a good case in point. The observation should be made here, though, that this kind of

reaction is not the exception. Rather, it is the case that an OECD rationale for PISA is to challenge complacency (and perhaps incrementalism) within national schooling systems; PISA shocks are an intense version of such challenges. OECD documents express this rationale clearly: '[E]vidence suggests that international pressure and competitive environments are more likely to diffuse a sense of ineluctability of some reforms among the various stakeholders and the public at large' (OECD, 2010: 315) and again, '[E]xperience shows that more comprehensive reforms are possible when there is a widespread recognition of the need for a change to take place – e.g. in case of external pressure, competitive threat or common enemy' (OECD, 2010: 335).

Additionally, research on the OECD and its education work would suggest that the Organisation has become more of a 'policy actor' in education over time (Henry et al., 2001; Lingard and Sellar, 2016); an element here is the Organisation's use of the media to frame the impact of PISA within nations. This is not to deny the complex relationships that the Organisation has with member nations and its extensive committee structures in each policy domain that conjointly set the agendas. Here we might see the OECD as the fulcrum in a network of relationships. However, the OECD's role as policy actor can be seen in its moves to increase national participation in PISA. Thus, in addition to the significance of national rationales and the OECD's rationale for PISA, the OECD's policy actor role through its media and other policy work is also important in understanding the impact of PISA within nations and its rise as an international ILSA. Furthermore, the 'success' of PISA has been a motivation for the OECD to develop other tests such as PISA for Development and PISA for Schools.

An OECD Media Relations Manager, who handles the media coverage of PISA, suggested that his role was 'to liaise between OECD experts and the outside world'. He added that he strived to make the work of the Directorate more appealing to the media, while acknowledging that the media were more interested in certain sorts of stories, particularly league tables of comparative performance. The media relations manager worked closely with the Head of the Directorate and of PISA to share the message the OECD wanted to deliver to the media. A few weeks before the release of PISA results in December of the year following that in which the test was administered, notification is sent to a list of approximately 4500 journalists globally, alerting them to the imminent publication of PISA results. The media team then work with the Education Directorate on a choreographed release of PISA results. One OECD staff member noted that not all OECD reports had such focused media releases as did the PISA report: 'We do these big media launches because it's a flagship'.

The media team at the OECD is also involved in the production of the PISA report and of the short, media-oriented country notes on national PISA performance. The Media Relations Manager stated, 'We work with (the Directorate) to work out a strategy for releasing it to the media'. The Education Directorate briefs journalists about the PISA results, seeking to manage the message that gets reported, and attempting to improve journalists' understanding of PISA and PISA results. The Media Relations Manager also noted that the Director's

...core audience is with, ideally, the Education Ministers .... He sees the value of media as another way to reach Education Ministers and also reaching to a more general public; especially with the policy makers. If the OECD brings out a report, it is very easy for the government Ministers to ignore it or be told about it by their staff, top down. Whereas, I am sure with PISA, the fact that it's all over the BBC in England, the Education Minister is going to be very aware of it.

Another OECD interviewee noted this use of media to strengthen the political impact of PISA: 'I think this organisation has made PISA more media focused and also more political ... Of course, you tend to use that to reinforce the impact'.

We can see the active role the OECD plays in seeking to frame the PISA stories reported in the media around the globe, aimed at the policy impact the OECD is seeking. Thus, it has been argued here that to understand the rise of ILSAs and national reasons for participation, we also need to understand the rationales for these tests within relevant international organisations and in respect of the OECD and PISA we must acknowledge the enhanced policy actor role that the OECD has taken and the role of 'media management' in seeking to enhance the impact of PISA.

## **Theorising ILSA participation**

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Why do countries decide to participate in ILSAs? In this forum paper, Addey and Sellar present key conceptual and analytical tools to elaborate complex and contextually relevant responses to this question. The authors, on the basis of their broad research experience, systematize an insightful analytical framework to understand the current global expansion of ILSAs. This is a framework mainly constructed inductively, but that dialogues with the main theories on global education policy, namely, rationalism, neo institutionalism, and critical or political economy approaches.

Rationalism would consider that countries decide to join ILSAs following a rational process of decision-making. According to this theoretical current, policy-makers would process the available information on the pros and cons of joining ILSAs and, if the benefits are higher than the costs, will be inclined to join. This approach is gaining momentum in a context in which policy-makers are increasingly expected to base their decisions on international data and evidence about “what works” in education, and ILSAs are highly functional in this respect. As mentioned in Addey and Sellar’s framework, many countries decide to participate in ILSAs as a way to strengthen their education systems, to design more effective curriculums, or to define benchmarks for improvement in education.

On its part, neo institutionalism is skeptical about the prevalence of purely rational decision-making processes. According to neo institutionalism, countries adopt global policies not necessarily because they need them, or because they know that they work well, but rather due to the legitimation pressures that governments receive to demonstrate to the international community that they are a modern and/or responsible state. As Addey and Sellar acknowledge, some countries might decide to join ILSAs “as part of a broader nation building narrative; to make a statement about political or economic status; [and] to align their values with an international community”.

Both rationalism and neo institutionalism provide important, but partial responses to the ILSAs’ participation question. Critical or political economy theories, including the globally-structured agenda for education (Dale, 2000), the politics and economics of borrowing and lending (Steiner-Khamsi 2010), the policy mobilities approach (Rizvi and Lingard 2009, Ball 2012) or, more recently, cultural political economy (Robertson and Dale, 2015, Verger, Fontdevila and Zancajo, 2016), put the focus on drivers of a different nature.

According to these approaches, beyond rational processes, a broad range of economic and political interests are behind processes of policy adoption and educational change. Ideas are seen as important in decision-making processes, but they should not be only understood as aseptic sources of data and information; the way in which ideas are constructed, framed and mobilized is key to understanding why and how countries engage with global education policies and, without going any further, with ILSAs (or with some ILSAs instead of others). Furthermore, beyond international legitimation and normative emulation, ILSA participation is the result of complex multi-scalar interactions, which go from external pressures from the aid community to the active political role of national actors such as ministries and institutions (not necessarily related to education), special interest groups or the media, to pick up on some examples mentioned in Sellar and Addey's presentation.

Finally, despite Addey and Sellar mentioning them, there are at least three general ILSA participation drivers that could be developed further from a political economy perspective, namely: skills' acquisition through international career opportunities; the presence of the education industry; and new public management. In a global economy, more and more countries face major economic pressures for educational reform and consider the acquisition of skills aligned to new labour market demands as a key strategy to raise the economic competitiveness of the state. Countries, business organisations and international organisations alike conceive the increase of learning outcomes as a central goal of educational reform. In this context, the measurement of learning outcomes – as established in ILSAs - becomes an end in itself, but also a core instrument to find out about the impact and the level of success of reforms.

From the point of view of economic interests, it is also worth mentioning that a testing industry has emerged in the context of global education reform. Companies like Pearson have specialized in evaluating and tracking the learning outcomes of children and sell evaluation and related school improvement services to international organisations, national and local governments, schools and/or families (Hogan et al. 2016). These private actors are actively lobbying for ILSA participation and the adoption of education evaluation systems at multiple scales. According to the OECD, with the “standardized student assessment [becoming] a more profitable industry (...) companies have strong incentives to lobby for the expansion of student standardised assessment as an educational policy” (OECD 2013, 51).

Finally, ILSA engagement needs to be understood in the context of broader paradigmatic changes such as the emergence and consolidation of NPM in public sector reform. NPM places

greater emphasis on public services being managed in more autonomous and competitive way, and according to the achievement of measurable outcomes (Gunter et al. 2016). Participation in ILSAs is strongly aligned with NPM since both NPM and ILSAs promote the evaluative role of the state in education, and a culture of management by results. ILSA participation is also aligned with other popular NPM-related models of educational reform such as accountability reforms and the establishment of common core standards.

In a nutshell, ILSAs are today at the center of global education policy processes and, accordingly, a better understanding of the international dissemination of ILSAs is absolutely strategic to advance global education policy as a field of studies. The expansion of ILSAs cannot be understood through single-factor theories, and needs the cross-fertilization of different theoretical approaches. The analytical framework produced by Addey and Sellar is an important contribution in this respect.



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