



# The Formation and Workings of a Global Education Governing Complex

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## INTRODUCTION

In keeping with the tracks laid out in Chap. 1, this chapter aims to review the arguments and findings of the preceding chapters in terms of adding to our understanding of the workings, mechanisms, range, and impact of the Organisation for Economic Co-operation and Development's (OECD) work in education from a historical, international, and global perspective across member and non-member states. The chapter will thus produce new perspectives, nuances, and additions to the research in the fields of history of education and education policy.

This book's analytical journey has taken us in many directions, both historically and geographically, and it establishes an empirical platform that provides some fairly generalized and recurring observations and findings concerning the workings of a global education governing complex revolving around the role and agency of the OECD.

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As an initial observation about nomenclature arising from the chapters' multifaceted analyses, the term *governing complex* appears to be very fitting, because a complex signifies 'a whole comprehending in its compass a number of parts, *esp.* (in later use) of interconnected parts or involved particulars; a complex or complicated whole' (*Oxford English Dictionary Online*). This means that the term allows for the interconnectedness and complexities of an organized structure made up of parts—that is, organizations, agents, technologies, discourses, and materialities—as we have seen in different shades and forms across the chapters. Although this meaning of the term *complex* has a strictly empirical–analytical orientation, the term also encompasses a more critical–analytical perspective gathered from the meaning ascribed to the term in the field of psychoanalysis. Here, the term *complex* is defined as 'a related group of repressed or partly repressed emotionally significant ideas which cause psychic conflict leading to abnormal mental states or behaviour' (*Oxford English Dictionary Online*). This understanding of *complex* feeds our understanding of the sometimes paradoxical and even perverse workings and outcomes of the global governing complex in education. Such workings and outcomes result from the competing agendas associated with different stakeholders, political priorities, and discursive struggles often characteristic of education policies, especially when critically studied across local, regional, national, transnational, and global perspectives.

Starting from this somewhat theoretical point, this chapter aims to delve into this governing complex and reveal its constitution, mechanisms, and trajectories as well as explicate the book's connections with and contributions to the fields of history of education and policy research. The chapter largely follows a bifurcated structure, looking first at the formation and trajectories of a global education governing complex emerging from the chapters, before moving on to the workings of the complex.

## FORMATION AND TRAJECTORIES OF THE GLOBAL EDUCATION GOVERNING COMPLEX

Opening up the historical files of the OECD clearly leaves the impression of a highly complex organization that was even sometimes at odds with itself. In other words, the archival sources of the different branches, committees, offices, members, and partners display both strong and powerful

agendas, as well as ambiguities and sometimes even contradictions in terms of agendas, aims, and understandings of the OECD's purpose.

For instance, in 1960, the then Organisation for European Economic Co-operation (OEEC) director Alexander King described the development of indicators as an 'essential prerequisite to the elaboration of *sound* educational programmes'. To secure *soundness* in educational programs, 'the work should be based on quantitative measurements and relationship between the main "inputs" into the educational system' (OEEC 1960: 7, my emphasis). If anything, King's statement reminds us of the application of input-/output-focused systems analysis to the field of education (Elfert, this volume; Bürgi 2015, 2016). As demonstrated by Centeno, the Committee for Scientific and Technical Personnel has largely subscribed to such a quantitative and descriptive approach to education. However, the formation of the Centre for Educational Research and Innovation (CERI)—following ideological and philosophical debates concerning the nature of its educational activities (Grek and Ydesen 2021)—expanded the OECD's work in education to also include qualitative policy studies. Such shifts and debates seem to be a recurring feature in the governing complex revolving around the OECD.

In the 1970s, in an entirely different branch of the OECD-centered governing complex, Robert Harris, then head of the Australian Education Research and Development Committee (ERDC)—which was providing input for Australia's work with the OECD in education in general and US education policies in particular—expressed serious concerns about the use of National Assessment for Educational Progress-type assessments in Australia (cited in Ydesen and Bomholt 2019; see also Ørskov, this volume):

Forms of accountability which are limited to the consideration of quantitative measures are particularly damaging when attempts are made to incorporate those quantitative measures in 'cost-effectiveness analyses', in which outcomes based on pupils' test scores in specific skill areas are compared with financial inputs. One cannot quantify and thereby include in a cost-effectiveness balance sheet a school's success in developing amongst its pupils the spark of creativity, a sense of determination, the motivation to make a contribution to life, or concern and compassion for their fellows.

This brief historical example shows considerable differences over time and in different organizational settings in relation to how to approach and handle education. It is therefore not an exaggeration to say that the for-

mation of the contemporary governing complex in education has been the subject of both collaboration and struggles between various agents.

However, to understand the trajectory to the launch of the Programme for International Student Assessment (PISA)—the contemporary hallmark of quantitative indicators in education—it is necessary to draw attention to the Social Indicator Development Programme, in the 1970s, for which the Education Committee established the Working Group on Educational Statistics and Indicators (Centeno 2017). This program laid the groundwork for the International Indicators and Evaluation of Educational Systems program established in 1988 (Andreasen, this volume; Grek and Ydesen 2021; Lewis, this volume), which, in turn, served as a precursor of PISA.

It is therefore possible, despite the ambiguities and contradictions, to connect the dots and establish valid historical narratives. As demonstrated in the chapters, there are salient aspects that allow us to draw a consistent picture of the formation and trajectories of a global education governing complex.

One way to start is to look at the underlying assumptions, that is, the inherent values, of an OECD-centered governing complex. The first point that emerges from the chapters is the ideological component in the OECD's work in education. Bürgi describes the early formative stages as an 'enculturation' process, with education serving as a dissemination mechanism rooted in a 'US endeavour that aimed at maintaining Europe within the ideology and epistemology of the capitalist West' (19). Elfert also finds evidence of such a diffusion of American hegemony leading to the 'primacy of economics over politics' (54). Drawing on her remarkable interview with Ron Gass, the first director of CERI, Elfert makes the connection with the contemporary situation in which a neo-conservative movement occupied by a focus on 'what works' has risen to prominence in education policy. Bürgi's and Elfert's arguments also resonate with Chap. 7, in which the author finds an 'instrumental relationship between the education system and the labour market' (137), meaning a marked reductionism in terms of education. In other words, a picture can be drawn of the OECD's historical trajectory in education as a distinct rationalistic approach hinging on the economization of education, devoid of concerns about pedagogy, didactics, or even invoking in students a 'spark of creativity, a sense of determination, the motivation to make a contribution to life, or concern and compassion for their fellows', as pointed out by Harris above.<sup>1</sup> As demonstrated by Ørskov, such discussions about the

social and economic roles of education have been amply present in the Australian context.

In this sense, Chap. 11 also emphasizes a strong normative dimension in the OECD's policy work. The picture is further sustained by indications such as the New Dialogue between Education and the Economy leading to precisely the launch of the *Education at a Glance* reports from 1992 and the development of outcome indicators for education as a basis for international comparisons and increased accountability (OECD 1989).

In making this point about ideology, values, and underlying assumptions in the OECD's approach to education, it is perhaps prudent to remember that the *D* in OECD stands for *development*. A notion of development is necessarily based on the premise that something is better or more advanced than something else. This kind of judgment requires values and normativity by default. In this sense, the OECD's work in education can be viewed as an ideology establishing a Western hierarchical understanding of development stages categorizing the world into developed countries, developing countries, and even wrongly developed countries. In congruence with this point, both Krejsler and Acosta argue that countries in the global South aspire to join the OECD as a sign of their 'level of development'. Further, as also demonstrated in Chap. 12, there is a distinct Eurocentric—or Western-centric—component in the historical conception of development very similar to that found in classical modernization theory (e.g. Rostow 1960; see also Ydesen and Verschaeve 2019).<sup>2</sup>

From a critical perspective, however, one could claim that these findings about ideology, values, and underlying assumptions are not surprising. The OEEC/OECD was—and remains—in essence an economic intergovernmental organization and, therefore, the OECD is only expected to pursue an economic perspective on education. However, the importance of the finding lies in the implications and repercussions for education globally.

The ideological components and the historical trajectories behind these implications and repercussions most commonly remain hidden and tacitly shrouded in conceptions and prejudices about what is rational, necessary, and wise in terms of education policy. OECD policies, recommendations, programs, and technologies therefore permeate and colonize education globally. In other words, as pointed out by Krejsler, soft power strategies such as partnerships, joint ownership, attractiveness projects, and shared

values have global effects through various collaborations, organizations, agents, technologies, discourses, and materialities promoting a one-dimensional perception of education. Demonstrating an empirical unfolding of the economic paradigm in education, Zou shows the connection between preschool children's competences and economic competition in the Chinese case, which leads the author to write about 'a reductionist chain in education policy' (171). While Andreassen emphasizes the general influence of educational assessment practice, such as PISA, on education systems at all levels, from ministries to classrooms, and how it could compromise and challenge democratic ideals. Holloway's analysis of OECD-promoted distributed leadership reforms relates to the same point, in that it critiques the accountability-based promotion of distributed leadership as missing an opportunity to advance democratic ideals that could otherwise be achieved by including more participants in decision making processes in schools. Perhaps the tension here can be summarized as a struggle between an economic versus a humanistic approach to education.

Another important point in relation to the formation and trajectories of a governing complex is the transformation of education in the OEEC/OECD organization from a peripheral issue into one of the organization's core activities, culminating with PISA and its offspring product developments (Lewis, this volume). Centeno's historical analysis demonstrates that 'education moved from a peripheral position in the OECD to become the focus of a specialised autonomous centre (CERI) and of a policy committee' (65). And the fact that the OECD, from its very inception, was envisaged as a global organization—and, even more powerfully, remains one today—opens a window and even a necessary condition for the OECD to take on a central role in the formation of a contemporary global governing complex in education. The global organization, powerful dissemination tools, and soft governance mechanisms simply turn OECD policies, recommendations, targets, and ambitions in education into a global endeavor.

On the other hand, it is important to remember that the OECD is not a monolith wielding unlimited power and authority. Using the OECD as an instrument, other powerful agents also work through it and/or take up and promote agendas, sometimes even alternative or competing agendas. For instance, the United Nations system—and, in the field of education, UNESCO, with Sustainable Development Goal 4—has launched an extremely powerful agenda, and the OECD has had to adopt and connect with this agenda in its own work (OECD *n.d.*). In this sense, the OECD

is not alone in forming a governing complex. In the next section, we take a closer look at the workings of the global education governing complex revolving around the OECD, including its limitations.

### WORKINGS OF A GLOBAL EDUCATION GOVERNING COMPLEX

Attempting to understand the workings of the contemporary governing complex in education in light of the analyses of the chapters in this volume makes it clear that research questions hinging on the assumption of the OECD as the originator and principal organizer of the contemporary governance regime in global education are much too simplistic. There are simply too many interactions between contexts and agents in different positions, with different outlooks and meaning-making agendas, resulting in a complex picture of discursive struggles, promotions, resistances, inertias, modifications, and transformations. As an extra layer of complexity, Silva, in an analysis of the Brazilian case, finds a marked difference between what was planned in terms of education policy and the changes that were later described.

If anything, one of the book's main findings is that the directions, developments, and workings of the global governing complex in education arise from the resultant forces of complex interactions. Therefore, any attempt to understand the workings of the contemporary governing complex in education requires meticulous empirical analyses of the specific contexts, technologies, and agents involved.

However, as a particular category of agents in the global governing complex, international organizations (IOs) generally wield considerable authority and influence (e.g. Finnemore 1993; Finnemore and Sikkink 1998; Ydesen, this volume). As argued in Chap. 1, the OECD in particular plays the role of key arbiter and promoter in the creation of a governance-by-comparison, reference-based, and benchmarking-setting regime featuring powerful naming and shaming mechanisms and inciting paths for best practice. In a recently edited volume, Waldow and Steiner-Khamsi (2019) demonstrate how the ideology of reference societies profoundly permeates education policies today. As pointed out by Zou, 'once the path has been taken, it would be difficult to opt out as the expectations and inertia set their place' (170). The governing mechanism can be colloquially summed up in the German saying *so ein Ding muss ich auch haben* [I should also have one of those things]. In this respect, Krejsler even

emphasizes the role of fear of falling behind as a driver in the workings of the governing complex.

Zooming in on the governing mechanisms at play in these relational global education policy formation processes, Verger, Fontdevila, and Parcerisa, in their analysis of OECD-promoted school autonomy with accountability reforms, emphasize that the ‘OECD activates three main mechanisms of soft governance, namely, data gathering, policy evaluation, and idea generation’ (234), thus creating windows to advance policy change. An important point is that these windows are inherently transnational and, therefore, it is necessary to see beyond the state (Sluga 2011). In this sense, Verger, Fontdevila, and Parcerisa’s analysis connects with Lewis’ argument that new governing spaces transcending national borders are emerging, because education programs, such as PISA for Schools and PISA4U, are being promoted as universal products with ubiquitous applicability. According to the findings of Verger, Fontdevila, and Parcerisa, this claim to universality rests on the OECD’s ability to theorize policy solutions, subsequently matching them to a wide range of problems, and by framing them in a way they can accommodate different political agendas. Their arguments find support in the findings of the major research project Policy Knowledge and Lesson Drawing in Nordic School Reform in an Era of International Comparison, led by Kirsten Sivesind, of Oslo University, Norway. Here the OECD unequivocally appears as the most frequently referenced IO in education policy reform processes (Karseth et al. 2020).<sup>3</sup>

These findings are key to understanding the workings of the contemporary governing complex in education. However, they must also be understood in relation to another key feature of the workings of a governing complex, namely, what a recent article has called the struggle for survival perspective (Ydesen and Grek 2019). This perspective draws our attention to the fact that a number of powerful agents in the field besides the OECD are working to influence and shape education, such as UNESCO, the International Association for the Evaluation of Educational Achievement, the European Union, the World Bank, MERCOSUR, and edu-businesses, to mention just a few key players. Historically, the positions of these agents have shifted over time. This means that the OECD must ‘act strategically and secure its organisational survival by providing member-states, partners, and decision-makers with sought-after solutions to various sociocultural issues’ (Ydesen and Grek 2019: 3). Similarly, in research into the development of PISA-related products, Lewis (2017: 527) points out that



the ‘OECD’s sway’ over education can ‘only be maintained by continually producing new and relevant policy tools’. In other words, IOs must work with their external environment, and historical analyses can identify and explain changes in configurations across eras.

In this volume, Bürgi, Elfert, and Centeno, in their respective chapters, demonstrate how the OECD has undergone an organizational adaptation to changing external conditions. Adding to this insight, Trine Juul Reder (2018) shows how the OECD has gradually devoted increasing strategic focus to emerging economies and has taken on a very collaborative and service-minded approach, working with local authorities and agencies and offering expertise to countries for the development of statistical indicators. This implies that the indicators are being enacted in local practices, producing data for the OECD’s statistical indicators. The building of expertise inevitably creates shared mindsets and even epistemic communities. Verger, Fontdevila, and Parcerisa describe the OECD as an ‘instrument constituency’ (236), indicating the crucial role of numbers, data, and indicators in facilitating travel and how these metrics thereby become a constitutive factor of the global education governing complex because they create common meaning-making agendas. Additionally, as pointed out by Andreasen, politicians have an imperative to act on output data.

The concrete implications of these workings can only be teased out from empirical analyses. However, some of the key questions about how metrics are produced, what they mean for relations between IOs, and even how metrics transform IOs are currently being investigated in a new research project, *International Organisations and the Rise of a Global Metrological Field*, headed by Sotiria Grek at the University of Edinburgh, UK. As already suggested, the role of agency must not be overlooked, however. Chapter 2 describes a ‘network of change agents’ (29) that makes a point about a transnationally acting group of intellectuals, or public intellectuals as, for instance, Goodson (1999) labels people acting in this capacity. The professional outlook of such public intellectuals, such as Andreas Schleicher, makes a big difference in terms of how global education is shaped; whether the leading public intellectuals of the global education governing complex are economists, statisticians, sociologists, educators, or people with a teaching background does make a difference. This became obvious in the example of the Australian ERDC mentioned above.

From the perspective of a national context, the struggle for survival perspective reminds us that certain agents and groups could collaborate

with the OECD to promote certain agendas. For instance, Zou argues that the OECD's ideas have mainly been used for new approaches to accountability and mechanisms to legitimate policies in the Chinese educational field. In the Australian case, Ørskov has demonstrated 'a shift of authority towards the national level in educational policy making' (97) in the 1970s following interactions with the OECD. Within this dynamic of knowledge bases and interests, the importance of the role of experts and professionals and their preferences, agendas, and outlooks cannot be overestimated.

A final point following the historical perspectives adopted in this volume is the increasingly blurred lines between education and other societal domains. Today, education has a role to play in the solution of all sorts of social problems. Every challenge facing contemporary society—such as economic growth, social cohesion, integration, inequality, attainments gaps, minority rights, climate changes, and hate crimes—has an unmistakable educational component. Chapter 6 describes a widespread perception of education playing the strategic role as a booster of virtuous cycles in society. Historians of education have used the term *educationalization* to describe this phenomenon, tracing its emergence back to the Enlightenment and the formation of European nation states after 1800 (Depaepe and Smeyers 2008; Tröhler 2017). In this regard, Acosta argues the presence of a new kind of educationalization advanced by the systematic assessment of education systems by an independent organization such as the OECD. The implication is that the OECD's policy shaping work in education spills over into a whole range of other societal domains—directly and indirectly—creating new and expanding windows, channels, and spaces for governance.

Although the points above have been presented separately for the sake of clarity, none of them exists in splendid isolation. They are, in fact, closely interwoven, and some even condition each other. Drawing on the point in Chap. 1 about historical sequences containing the seeds of a merger between education, governance, and economics, we find that the resultant forces of the complex interactions treated provide a picture of a global education governing complex characterized by (1) a historical trajectory going back to World War II and shaped during the bipolar world order of the Cold War; (2) distinct ideological components of capitalist economics pursuing economic growth based on human resources and the establishment of a well-functioning labor market; (3) underlying assumptions about the universality and general applicability of education pro-

grams and practices; and (4) inherent values about education being a utilitarian endeavor. All of these aspects are all too often overlooked in political discourse about education, and they need to be critically studied across local, regional, national, transnational, and global perspectives. The findings in this volume suggest that we need to research policies, practices, programs, and instruments as well as looking at organizations, agents, technologies, discourses, and materialities to (1) determine the trajectories springing from them and their combinability with other governing complexes and political agendas; (2) reflect on their implications in terms of the human condition; and (3) not least, to reflect on the very future of education as an institution in society.

## NOTES

1. It should be duly mentioned that the latest PISA developments have sought to include more creative and social competences (Lewis, this volume). Even so, these dimensions still seem to hinge on a basically economic idea about measuring the allegedly appropriate kinds of competences for performing well in the future labor market.
2. Interestingly, in his recent book, director of the OECD Directorate of Education and Skills, Andreas Schleicher (2018: 126), seems to emphasize a clear inspiration from Asian education systems: ‘The fact that students in most East Asian countries consistently believe that achievement is mainly a product of hard work, rather than inherited intelligence as Western children would often say, suggests that education and its social context can make a difference in instilling values that foster success in education’. If anything, this observation raises the question of what happens to historically Western organizations when they go global.
3. Although, in some European contexts, the European Union rates higher because of a distinct European frame of reference (e.g. Lawn and Grek 2012).

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