Comparative and International Education in my Experience: 1970-2022

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Stephen P. Heyneman
Professor (Emeritus)
International Education Policy
Vanderbilt University
s.heyneman@vanderbilt.edu

*References listed in the annex, may be obtained here: https://comparative-education.com/

Professor Sheng-Ju Chan, academic and professional colleagues, I am honored to be offered the opportunity to address you today but ask that you forgive me. Instead of pioneering a new finding, I ask that you allow me to review what I tried to do yesterday. And the day-before-yesterday. And in some cases, at a time before many of you were born. I ask for your permission to start from the beginning.

1970-1980

1970, I was a lowly graduate student with no settled topic for a dissertation. Philip Foster knocked on my office door. Heyneman, he said, Uganda has just advertised a job to study the results of their primary school leaving examination. I want you to apply. But I don't know anything about academic achievement or examinations, and I am interested in other topics. He studied me carefully: So, you have a viable alternative? I did not.

Soon afterward, I was on a plane to a country I had never visited and knew little about. I had a contract to administer a survey and a budget for supplies. What would be in the survey? How would it be structured? Who would be the respondents? I had no idea. So, I did what any graduate student might do: I followed what someone else did before me. Fortunately, a study had just been released by the U.S. Congress which analyzed children's academic achievement in the United States. Computers were just beginning to be used in the social sciences and this study, called the 'Coleman Report' was the first national survey of American School children.[1] I used the questionnaires and followed the methods.

[1] James S. Coleman, et.al., *Equality of Educational Opportunity Report*. Washington DC: National Center for Educational Statistics 1966

I drew up a random sample of schools and designed questions for the teachers, the headmaster, and grade seven children about to sit for the examination necessary to enter a secondary school.[2] I visited each school in the sample. Questionnaires were administered in English. Oral translations were available in six languages. The number of educational items (maps, books, desks etc.) were counted each classroom. Student exam scores were matched with their names. After a year, I returned to my university in Chicago. And there I had a crisis.

I could find no correlations between family socio-economic status and academic achievement. School children in Uganda did not perform like school children in the United States. James Coleman was on my dissertation committee! Can you imagine what it might feel like to argue that your findings contradict the findings of the most important person on your dissertation committee? I was terrified. But the dissertation passed.[3]

Later I received a call from the Director of the Education Department at the World Bank. He wanted me to make a presentation to staff. After that, I was offered a job. I was to be the Bank's second sociologist in the Education Sector. My assignment was to introduce the methods used in my dissertation to ministers of education so they could strengthen their response to ministers of finance about what influences student learning and which investments make the most difference. In 1978 the Bank approved a research project to broaden the Uganda study by accessing other data sets. The result was a comparison of the influences on academic achievement across 29 high and low-income countries. It was discovered that school quality has

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[2] In 1970 there were enough places in secondary school for only 2% of the grade seven children taking the examination.

[3] S.P. Heyneman, *Influences on Academic Achievement in Uganda: A 'Coleman Report' from a non-Industrialized Society, PhD* Dissertation, University of Chicago, June 1975.

more impact in lower-income countries and family background has less impact in lower-income countries.[4] Over the next several decades, this finding helped international agencies justify assistance to education.

Is the finding from 1983 still true today? There have been many challenging theories. But some say that that yes, the finding is still true.[5] Am I happy about that? Not really. I don't believe the point of scholarship should be to be technically right. I believe the point of scholarship should be to help launch a new direction of questions. In this case, the question launched was not whether children from privileged families do better in school. The question launched was why there is so much variation in the answer to that question, both between and within countries.

The work in 1983 however, did not address the question of what to invest in. Which works? Better curriculum? Better teacher training? Pedagogy? Child health? I could not forget what those classrooms looked like in 1971. Many had only one book available. The teacher would have to copy the content of the book onto the blackboard and students were required to re-copy what was on the blackboard to their copy books. The 'copy-copy pedagogy' was typical of poor classrooms in many countries. Across studies, textbook availability was the strongest and most consistent predictor of reading ability. That is when we began to focus on the requirement of having something for students to read when trying to teach reading.

[4] S. P. Heyneman and W. Loxley, "The Effect of Primary School Quality on Academic Achievement Across 29 High- and Low-Income Countries," *American Journal of Sociology* Vol.88 No. 6 1983, pp. 1162-94

[5] J. Lee and F. Borgonovi" Relationships Between Family Socio-Economic Status and Mathematics Achievement in OECD and Non-OECD Countries," *Comparative Education Review* Vol. 66 no. 2 (May), 2022, pp. 199-228

And that, in turn, led to an argument with senior economists in the World Bank. They insisted that the World Bank could not be financially involved because textbooks were a recurrent cost not a capital cost. But when building a railroad, isn't a train required? When building a highway, isn't maintenance equipment required? This argument took us two years to win, but once textbooks could be treated as a capital cost, World Bank education staff underwent training in the design, production, manufacture, and distribution of reading materials so that they could better design projects. Following that, development agencies became principal international source for school reading materials. That is what happened within the 1970's.

1980- 1990

When African countries met in Addis Ababa in 1960 to discuss development, each arrived with a plan to expand their education system. Each plan was justified by using a methodology called 'manpower forecasting'. Thirty years later, when countries met in Thailand, each had a plan, but none of the plans were justified by using a manpower forecast. Why? Because of the war against manpower forecasting conducted within the World Bank.

Manpower forecasting was a method of estimating the 'gaps' in the number and kinds of technical skills needed to implement large scale infrastructure investments --- in highways, ports, factories. It limited all attention to the quantity of engineers and other specialists. The method was used by every international organization, UNESCO, ILO, OECD, and others. When I entered the Bank in 1976, the education sector recognized no other methodology.

This posed a problem because there was another methodology called 'economic rate of return' which I had learned at the University of Chicago. The differences between Manpower Forecasting and Economic Rate of Return were important. Manpower forecasting did not include costs. It did not monetize benefits and it was confined to technical skills and the specialized training. By using manpower forecasting there was no way to justify investments in primary, general secondary or higher education (other than schools of engineering).

Because of the monopoly of manpower forecasting, the Bank could not respond to requests from countries for investments in primary, secondary or university education. It had to change its analytic methods to meet these demands. I have described the fight to make the change in some detail elsewhere and will not repeat the details here. It included using rates of return on Bank economic documents, making certain that the new methods were incorporated into the 1980 Bank Education policy paper, and impressing managers with the increase in demand from countries to expand lending into areas not previously justified when using manpower forecasting. Employing the research described above and the new economic methodology described here, by the end of the 1980's the Bank and all other donors were actively engaged in assisting general education.

During the 1980's I was transferred from the Bank's 'center' with inter-regional responsibilities to the Middle East and North Africa (MENA), one of six regions. I discovered that the countries had no tangible idea as to how much students were learning because there were no statistical measures available. In response, I spent time working with the U.S. National Academy of Science to help generate the necessary measures and publicly utilize them. Today these measures implemented by the UNESCO Institute of Statistics, the International Association for the Evaluation of Educational

Achievement, and the Organization for Economic Cooperation and Development have become global.

In MENA, I also discovered an absence in understanding the role which Islam plays in school systems. Like other international organizations, the Bank had many staff who were of the Muslim faith, but the connections between and Islam and public education were not discussed. I also was ignorant of those connections, so I employed scholars of Islam to explain them and help incorporate some of the lessons into our planning and thinking.[6]

1990-2000

When the Soviet Union imploded many new countries applied to join the World Bank. I was asked whether I wanted to stay as the Technical Division Chief in the MENA region or become the Technical Division Chief for a newly organized region with 28 countries called ECA (Europe and Central Asia). I spoke none of the languages; I had never studied its history; I knew nothing of its peoples or cultures. But every one was ignorant because the region was new to us. But none of us who chose to work on the problems in ECA would regret it. The challenges were globally important, and fascinating.

Countries in ECA had already achieved full school attendance, equal participation of women, and universal adult literacy. But the shift from a command to a market economy required a significant restructuring to their education systems. We had to document the required changes. We had to illustrate what needed to be done and why it was important. In doing this, we had to compete for attention

[6] The report titled Islam and Social Policy was barred from being published by the executive director from Saudi Arabia on grounds that the Bank had no business addressing the issue of Islam. Publication had to wait for two decades until I was at Vanderbilt University. See Is*lam and Social Policy.* (2004) Nashville. Vanderbilt University Press.

and resources with those working on the hazards of nuclear power, massive industrial unemployment, and the collapse of pensions, agriculture, transportation, and public health. Unlike Africa, Asia, Latin America, and the Middle East it was not a question of build up what they don't have, but a question of build down what they have and build up what they need for the change in their economies.

For example, kinder gardens and vocational education were financed and managed by state owned industries. Fine. But the State-Owned Industries were bankrupt. So these education subsectors simply collapsed. More importantly though, the economic incentives had changed.

In the past, once students finished vocational school they were assigned to a job in a specific enterprise. They had little choice. But after youth were allowed to seek employment anywhere, it meant that graduates could suddenly choose employment independent of their highly specialized training. So how does a vocational school suddenly train someone who seeks employment using skills the vocational school does not offer?

Universities were managed by sector ministries. In the Russian Federation, 42 ministries oversaw universities. The ministry of small engine repairs managed four. All universities were assigned a specific list of specializations for which they had to prepare students. But rectors could see that there were new subjects and new specializations – journalism, survey research, advertising, business management – for which they could charge desperately-needed tuition. But rectors were 'handcuffed' by their sectoral ministries which allowed them to only offer training from proscribed lists of specializations. In sum, the kinds of challenges faced by education in the former Party/States were quite different from other parts of the world.

These differences gave rise to a second war over methodology. Manpower planning had been replaced by the economic rate of return. Fine. But the highest economic returns were found to be from primary education and less from secondary education and least from higher education. A few senior economists in the Bank interpreted the rate of return results to mean that the Bank should only invest in primary education. But borrowers had changed. They now included Russia, China, Indonesia, India, Brazil, Ukraine, Chile, countries quite different from Malawi, Niger, and Papua New Guinea. Once again, the Bank needed to shift away from an analytic monopoly. It had to jettison rate of return and use a diversity of methods which could more accurately assess the benefits at any level of education. This war took a decade and led to me being declared 'redundant' as a staff member. Personal story aside, eventually the war was won and today the Bank and other development assistance organizations have no analytic monopolies. This is progress.

2000-2010

In the Russian Federation there were over 100 different languages and ethnic groups. Each of the world's major religions have believers in Russia. Every group was suddenly anxious to teach their histories through the schools. And in all cases, their histories were filled with stories of oppression from other groups. The tension which this raised led me to reflect on the purpose of schooling. I was granted a leave of absence at a UNICEF research center in Italy. There I dug into the literature on the origins of public education and the political debates over its purpose. I discovered that the origins and debates had less to do with skills and monetary rates of return and more to do with the need to achieve society social cohesion. Once I had understood its importance, I devoted time to how social cohesion gets influenced by education. This included ways in which schools can affect social cohesion positively but also negatively.

When working in Central Asia for instance, I discovered how common it was for education to be corrupt; how university faculty collect bribes for grades; how ministries collect bribes for accreditation. After I became a professor at Vanderbilt University, I was fortunate to receive several grants to study the problems of education corruption. I interviewed faculty, helped design student surveys on corruption, estimated the economic costs of corruption and tried to establish a distinction between what is a corrupt act and what is a normal gift in gratitude for a deserving teacher.

2010-2022

Being at a world class university and a leading graduate school of education I became increasingly interested in how things operated in terms of incentives, costs, strategies, relationships with the local community and the wider public.[7] I served on the faculty senate and witnessed the debates between different factions over whether the university should engage in classified defense-related research. Faculty at the Divinity School were on one side; faculty at the School of Nursing were on the other. The nursing school faculty argued that the scientific work being conducted on treatment from biological war was state-of-the-art and Vanderbilt would be sidetracked if it couldn't compete for research leadership in that field even though the research was classified as confidential. When a vote came, the school of nursing won.

That experience helped me reflect on the nature of the university as an institution. Although I was surrounded by academic wealth, I could never forget that as a young man I had attended a two-year local community college which had helped me get admitted to UC-

[7] At the time, Vanderbilt's Peabody Graduate School of Education was ranked number one in the U.S.

Berkeley, a four-year university. At Vanderbilt I taught a course on Comparative Higher Education. I utilized what I was learning when asked for ideas by universities and ministries of higher education.

I focused on the reasons why universities must compete. I have discovered that at the leading level, academic labor markets are now global. I once attended a management meeting at a competitive university in Denmark. There was a debate about whether the criteria for promotion should value publications in English over those in Danish. I could feel the dismay from the Chair of the Danish language department, but the reasoning behind the proposed promotion criteria came from the chairs in economics, computer sciences, business management, physics, international law, and medicine.

Some may classify me as 'neoliberal' because I acknowledge the inevitability of higher education competition. I think the classification may be short-sighted. To acknowledge a reality is not the same as approving it. Aside from how to compete, I have spent quite a lot of energy helping university systems avoid the negative ramifications of unfettered competition.

What I try to convey is the utility of divergent purposes. Community and teaching colleges do not need to promote faculty based on their publications. On the other hand, where new knowledge is invented, then promotion should be consistent with the university's mission. The problem comes when governments force every higher education institution to be research-based. This creates distortions which are both counter-productive and unnecessary.

But world class universities can also lead in ways other than research. They can be moral leaders as well. I have tried to point out how this occurs with world class universities and their ways of admitting and handling corruption.

Beyond 2022

Thank you for being patient and allowing me to ramble through these various endeavors. About the future, let me mention three issues of concern:

International aid to education is a half century old. Several world conferences have tried to set goals for how much resources for education should be transferred from wealthy to low-income countries. Comparatively less attention has been paid to the obligation of the recipient countries to invest more in themselves. The balance of attention now needs to shift.

Secondly, the question has been raised as to how the international 'aid architecture' could be changed to be more effective. In my view, international assistance should concentrate on three objectives: (i) assistance to those who have had to flee from natural catastrophe and armed conflict; (ii) the underwriting of the public good in education, the collection and analysis of better data for instance; and (iii) the establishment of a new mechanism to monitor professional standards of social cohesion in the presentation of history, civics, and the teaching of the humanity of other races, ethnicities, religions and neighbors.

Lastly is the question of whether a world class university can exist in an autocratic country. My short answer is no, it cannot. The reason is this: as organizations, great universities are powerful not because they control armies or because they have executive power to tax or in one way or another compel citizens. Great universities are powerful because they are endowed with deciding what knowledge is most worth having, who should teach it, and how that knowledge should be acquired. World Class universities must be autonomous in making those three decisions. That is how they were born in the 13th Century, and that is what makes them unique today.

I have found that autocratic governments use three methods to reduce the risk of intellectual challenges coming from universities. They restrict courses to technical subjects. They use management oversight to weaken university autonomy. And they place legal barriers against universities from economically developing on their own. So far, I have been privileged to work on education problems in 65 countries. From my experience, I don't believe an autocratic government could be comfortable allowing the freedom necessary for a world class university to genuinely prosper.

Thank you for your attention.

I welcome your questions and comments.

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