

**DIRECTORATE FOR EDUCATION AND SKILLS
EDUCATION POLICY COMMITTEE**

Cancels & replaces the same document of 02 April 2015

Education Policy Outlook 2015-16: Update And Objectives

16-17 April 2015

This cancel and replace version is being issued to correct the biennium indicated in paragraph 2 (2015-16).

This document reviews progress up to date and presents plans for 2015-2016. It is meant as information for EDPC Delegates and others following and interested in the Education Policy Outlook.

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JT03373648

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EDUCATION POLICY OUTLOOK 2015-16: UPDATE AND OBJECTIVES

Summary and background

1. The Education Policy Outlook series is intended to assist policymakers in the design and implementation of policies by providing information and analysis on how different countries are responding to educational challenges. It provides systematic comparative analysis of policy reforms, and reviews individual country education policy approaches in a succinct format. A detailed description of the project, developed in consultation with delegates and country representatives, is included in the proposal [[EDU/EDPC\(2012\)17/REV1](#)], which includes concrete deliverables (on [website](#)):

- The ***Education Policy Outlook Comparative Edition***: provides a comparative view of trends in education reform across OECD countries, and a snapshot of each OECD country education policy context, challenge and reforms.
- ***Education Policy Outlook: Country Profiles***: Short country-specific documents that deliver an independent, synthetic and comparable overview of OECD and non-OECD education systems. In around 20 pages, they present the education system's current context, challenges and policy responses, organised according to six policy levers.
- The ***Education Policy Reforms Finder***: This knowledge base of reforms allows policy reforms to be sorted by policy lever, country, objective, or year. It also provides direct links to external websites describing the policy reforms.

2. At its last meeting, the EDPC decided to allocate all available Part I funds for this output to ensure the completion of the country profiles during the 2015-16 biennium. The implication is that any work on further comparative editions of the Policy Outlook or on the education policy reform finder would be contingent on additional voluntary contributions.

Update on Progress

3. Since its inception in 2012-2013, the Education Policy Outlook series has focused on developing systematic comparative knowledge on education policy reforms, with the long term perspective of providing policy makers and others with information to support them in making policy choices. During this first stage, the OECD team, in consultation with EDPC delegates developed the outputs below, presented in chronological order.

Education Policy Outlook: Analytical Framework

4. The Education Policy Outlook series developed an analytical framework organized into six policy levers to analyse education policies across different areas of countries' education systems. Policy levers refer to the instruments which policy makers have at their disposal to direct, manage and "steer" change in public services, the range of functional mechanisms through which government and its agencies seek to implement policies and improve outcomes. Their selection is not neutral or automatic – it can be

political and depend, for example, on the objectives established, the analysis of potential benefits or the capacity of impact foreseen.

5. The six policy levers in the Education Policy Outlook's analytical framework classify existing analysis from major projects at OECD during a time-span of about ten years and selected international evidence targeting improving performance and equity in education systems. The policy levers developed for this analytical framework are grouped in three categories:

- Students: How to raise outcomes for all in terms of equity and quality and preparing students for the future (refers to outputs of the education system).
- Institutions: How to raise the quality of instruction through school improvement and evaluation and assessment (refers to quality of the inputs).
- Systems: How to align governance and funding of education systems to be effective.

6. This framework used as the analytical framework for country profiles and for the comparative report to analyse and compare policies implemented across OECD countries from 2008 through 2014, is explained more in detail in Annex 1.

Education Policy Outlook: Country Profiles

7. The Education Policy Outlook: Country Profiles were designed to provide a synthetic and comparable overview of a country's education system through an OECD lens. Profiles have been developed for 17 countries: Australia, Canada, Chile, the Czech Republic, Denmark, Finland, France, Germany, Ireland, Mexico, the Netherlands, New Zealand, Norway, Portugal, Spain and Turkey and the United Kingdom.

8. Some valuable lessons have been learned from this process:

- The exchange with countries is necessary and enriching to the process, to consolidate the knowledge obtained through this desk-based exercise.
- Country governance arrangements vary and it is important to adapt the documents to each country's policy organization while maintaining comparability. The OECD Secretariat has therefore made specific collaboration efforts for countries with highly decentralized education systems, such as Canada, Germany or the United Kingdom.
- It is important to clarify that these documents remain an independent analysis authored by the OECD and countries find this independence a key part of their value. To this end, the early engagement with the country is essential, as well as the need to keep the process as planned following OECD guidelines.
- Developing a first published version of a country profile is an analytically intensive exercise for both the OECD Secretariat and the country, since they require balancing and synthesizing a first analysis of a country's education system. It is expected that subsequent versions will require less time and effort to update.

9. The OECD Directorate for Education has received positive feedback on the different uses given to the country profiles. According to comments received from countries, the published country profiles are used by their Education ministries to: compare their own education systems with others, prepare their

ministers for meetings and missions to other countries, or as a basic entrance door for external actors into their own education systems. Given the necessary co-ordination process within a ministry during the revision of their draft country profiles, some countries have also expressed that this process has been a useful exercise to improve the way in which information is exchanged in their ministries. At the OECD, the country profiles are also used in other OECD Directorates, such as the Directorate for Economics to develop their Economic Reviews, or the Office of the Secretary General.

The Comparative Report Education Policy Outlook 2015: Making Reforms Happen

10. This first edition of the *Education Policy Outlook 2015: Making Reforms Happen* was launched in January 2015. It aims to help policy makers and other stakeholders in education learn how their peers in other countries respond to common challenges, from teaching diverse student populations to instituting measures that render schools accountable for the quality of the education they provide. The report offers a first look at some 450 education reforms that were adopted across OECD countries between 2008 and 2014. While these policies were developed in specific contexts, they can serve as inspiration for policy makers who are looking for effective ways to improve their own education systems.

11. The report is organised into three main parts:

- *Reform trends* identified across OECD countries according to the six policy levers of the Education Policy Outlook's analytical framework.
- *A focus on reforms*, to analyse factors that policy makers need to consider when implementing policy reforms in evaluation and assessment, innovative learning environments and school improvement.
- *Country snapshots* of education policy across the 34 OECD countries (based on survey responses from countries, existing country profiles and OECD knowledge), present the context, key issues and goals, and recent policies.

12. The report had considerable media impact during its launch, with press coverage, social media coverage, including twitter, slideshare and other platforms. It has been translated into French and Spanish and will be translated into Polish (further to a request from a Polish publisher).

Conference Education Policy Outlook: Making Reforms Happen, London, 22-23 January 2015

13. This conference was hosted by the English Department for Education on 19-20 January 2015. It gathered more than 130 participants from more than 30 delegations, including international policy makers, researchers, teacher union and business representatives, international organisation delegates, school leaders and some journalists. The objective of the conference was to launch the new *Education Policy Outlook 2015: Making Reforms Happen* and promote peer learning opportunities for policy makers from different education systems. To do so, the OECD Secretariat invited participants across OECD countries to present, discuss and share experiences of their specific education reforms and the factors that can contribute to success in implementation.

14. The conference combined keynotes, presentations and round-table sessions. Keynote speakers included: the UK Minister for School Reform, Nick Gibb; the OECD Director for Education and Special Advisor to the Secretary-General, Andreas Schleicher; the Permanent Secretary of Education, Chris Wormald. Other presenters included representatives from the Business and Industry Advisory Committee (BIAC) and the Trade Union Advisory Committee (TUAC), the OECD Education Policy Outlook Team

and country policy-makers. Information and PowerPoint presentations can be found on the conference website www.oecd.org/edu/conferenceepo2015.htm.

15. Among the main *conclusions* from the conference were:

- **Education reform is needed:** “Not improving education can assure you a permanent recession,” Many participants shared the need to not just be good enough, but to aim to be better. The long term goal is to have reforms that give children the best educational opportunities to then take on our countries’ future.
- **Countries have similar challenges but different solutions:** School improvement, investing in getting the best teachers into schools, and equity and quality are among the main ones, as is the need to raise standards for all. Countries also have different solutions which vary by history, governance, culture, size of the system.
- **The implementation process is key to success:** Clarify objectives and do not overload: know what you are trying to deliver, communicate and design a plan of how to get there.
 - Focus on challenges, align and define responsibilities and funding;
 - Focus on how the reforms will impact the schools and classrooms.
 - Engage stakeholders: Unless teachers and others are engaged, reforms will not move forward.
 - Integrated approaches to policy appear more effective than piece-meal approaches.
- **Evaluation of policies is needed.** While the scope, duration and complexity make evaluation difficult, it is key for education reform to build on evidence. It can also help in the long-run to have support for reforms as well as more impact.
- **Policy vs. politics:** Moving beyond the political debate towards the educational debate. The political debate is not necessarily negative as it means people care and are going to invest. The more evidence we can provide about the impact of reforms, the less politicised they can be and more consensus will build around them. There is a need to have quality reforms that are sustainable beyond political cycles. At the same time, there is a need to have politicians on board driving reforms, who need to be convinced of the reforms and need to understand the possible impact.
- **The Education Policy Outlook:** It is a first of its kind in taking a systematic approach to education policy reforms across OECD. It will continue to grow by focusing on implementation and evaluation of education policies, and key areas to strengthen education policy making. Countries confirmed their interest in continued analysis, as well as their further engagement and in organising similar events in the future.
- During the conference, OECD launched the **reforms finder**, which brings to the public an overview of OECD education reforms in a searchable format. It is part of the database that we originally prepared to undertake the trends analysis: <http://www.oecd.org/edu/reformsfinder.htm>

Box 1. Evaluation of the Conference Education Policy Outlook: Making Reforms Happen, London, 22-23 January 2015

Results from an evaluation survey completed by participants (online platform) showed that they were very satisfied with the conference, and found it valuable for its content, presentations, peer-learning and networking opportunities among peers from different countries. Among the responses, participants:

- Most rated it as very satisfactory and satisfactory. They particularly highlighted the following as very satisfactory: Session 4: country presentations, Mexico, Germany, Korea; Session 6: spotlight on classroom practices and Session 7: closing session).
- Valued the combination of presentations and table group discussions as well as the opportunity for in-depth analysis. "The event was an excellent combination of plenary sessions, break-out sessions and table discussions." Around half preferred the presentations and the other half the table discussions as a method most conducive for peer learning.
- Benefited from the use of social media: The hashtag #OECDPEO was used by more than 600 000 Twitter account during the launch. Approximately 42% use twitter. They also liked the social media stand as valuable to express their engagement.

Conference website with Powerpoints and relevant documentation: www.oecd.org/edu/conferenceepo2015.htm

16. The conference ended with an informal parallel *session with international delegates (including a number of EDPC delegates)* to review and get feedback on the future of the Outlook. Among the main issues raised at this session were:

- **Education Policy Outlook Comparative Report:** The main topics for the future edition of Education Policy Outlook proposed were *policy evaluation* and *implementation*. As the Outlook has taken a more descriptive approach to country policy reforms in this edition, and the questions of their effectiveness remains unanswered, countries asked whether the Outlook could take a leading role on this.
- **Country Profiles:** participants reiterated the importance of completion of the 34 OECD Education Policy Outlook Profiles. The EU Delegate confirmed their interest and financial support for the development of OECD-EU Country Profiles. The process of updating the profiles will need to be clarified later on. Countries were also eager to include additional topics to country profiles and to the policy analysis, including more on VET and higher education or initial teacher education.
- **Dissemination of findings:** participants want to build on the rich information already gathered by the Education Policy Outlook to develop targeted reports, which could take the format of an *Education Policy Outlook: Infocus*.
- **Enhancing the peer learning dimension:** participants considered these exchanges valuable, and are interested in building on the rich information base of the Education Policy Outlook to develop country and international peer learning seminars and webinars.
- **Education Policy Outlook Governance:** participants suggested the need of having an informal advisory board for the Education Policy Outlook, to get country engagement to steer and provide feedback on the content of the analysis. A small group of guiding members could therefore, for example: a) review profiles structure and content; b) get country steering and support on the

updating of profiles; c) review the topic of evaluation of policies, to see how to best integrate it into the Education Policy Outlook.

Mid-term and long-term objectives

17. The Education Policy Outlook is targeted to support policy makers by enhancing the knowledge and evidence base on education reforms and their implementation. To this end, it aims to consolidate its knowledge base, have complete and updated OECD country policy profiles for member countries and tailor the comparative report and the series towards analysis in areas that can help the policy making process.

18. Looking towards the present biennium and beyond, the OECD Secretariat aims to:

- *Work to complete and plan the update the Education Policy Outlook: Country Profiles.* The OECD Secretariat will start planning how to update the already existing country profiles. This could possibly include looking at the continuity/change in education policies in the country compared to the first edition of the document.
- *Define and deliver subsequent editions of the comparative report.* As the first stage has been rather a stock-taking and systematising approach (Education Policy Outlook 2015: Making Reforms Happen), the next stage will look to adopt a more forward-looking approach, focusing on delivering a longer-term vision of reforms, their implementation and evaluation.
- *Enhance peer-learning on education policy issues across countries.* Countries' involvement during the first Education Policy Outlook biennium has been key in the design and development of this series, both for input and steering but also in terms of peer-learning for countries. Strengthening this engagement is important and the Education Policy Outlook aims to improve the series by facilitating peer learning opportunities among countries in topics of common interest.

19. For the 2015-2016 biennium, the main focus will be to develop country profiles as proposed in Table 1. Beyond the core deliverables building on Part 1 funding, complementary deliverables could be possible with additional voluntary contributions.

Education Policy Outlook: Country Profiles (PWB 2015-2016)

20. During the 2015-2016 biennium, the OECD Secretariat will continue working to complete the delivery of education policy country profiles on a rolling basis. The proposed calendar has been updated taking into account country preferences, internal EDU capacity European Union support and other needs, including alignment to Economic Surveys. The aim is to complete most of the 34 Policy Profiles by 2016, with publications twice a year, aligning to EDPC meeting dates (Table 1).

Table 1. Preliminary calendar of publication of country policy profiles

3rd trim. 15 (round 5)	1st trim. 16 (round 6)	3rd trim. 16 (round 7)	1st trim. 17 (round 8)
Hungary	Estonia	Austria	Korea
Japan	Iceland	Belgium	
Poland	Israel	Greece	
Slovak Republic	Luxembourg	Italy	
Brazil (partner country)	Slovenia	Sweden	

21. This calendar is dependent on confirmation and receipt of a voluntary contribution by the European Union to complete OECD-European Union Country Profiles.

22. The exchange process with countries is intended to ensure that the data and information provided are correct, and that the analysis is pertinent. The steps can now be shortened with countries given the completion of the snapshot survey. Overall, these are the main steps a country needs to follow for the preparation of a policy country profile:

- 0) **Confirmation of the national co-ordinator's name and contact details:** This person will be the main contact point concerning the *Education Policy Outlook: Country Profile* with the OECD Secretariat. As a first step, the country is asked to confirm the name and contact details of this person.
- 1) **Verification of sources:** The OECD usually prepares an initial list of OECD sources to be used for the preparation of the initial draft. It then asks the country to review this list before the OECD Secretariat starts drafting the country profile. This step is no longer necessary if the country replied to the snapshot survey sent out to countries for the preparation of the comparative report (launched in 2015).
- 2) **Commenting on the first draft:** The OECD Secretariat will produce a first draft of the country profile, and will send it the country for general comments. Countries usually have a one-month period to revise this first draft. This general input from the country allows the OECD Secretariat to produce the final version of the country policy profile.
- 3) **Final revision:** After the revision of the country's first comments, the OECD Secretariat produces a final version of the document, and sends it back to the country for final feedback, such as remaining questions and corrections, with a one-week consultation period.
- 4) **Publication:** Once the content of the profile is final, the OECD Secretariat edits the document and sends back to the country for information before publishing it on the OECD and the project websites. The OECD can also work with the country for any dissemination events. Countries may choose to translate their country profiles.

Complementary Deliverables

23. Additional deliverables may be planned if there are resources available. Among these, there are different possibilities listed below.

Education Policy Outlook: Reforms Finder

24. The OECD Education Policy Outlook: Reforms Finder, currently a pilot version, aims to be a database of education reforms gathered by the Education Policy Outlook series. The reforms would be sorted by criteria such as country, policy lever, educational level and many others. Users will be able to search based on their own needs and interests, generate charts, maps; and easily save, embed, and share them. Interactive and connected to social media, it will benefit from users' feedback and evolve continually. The Finder would also feed the core knowledge on reforms produced by the Education Policy Outlook into the GPS by developing a database of education reforms.

25. This output requires additional funding to cover the costs of analytical support and supervision to develop the data base, update and follow up on reforms to ensure it is valuable for users and quality controlled. An initial pilot is available at <http://www.oecd.org/edu/reformsfinder.htm>.

Education Policy Outlook: Peer Learning and Implementation Support

26. The Education Policy Outlook is developing a strong analytical knowledge base on education policy reforms and their implementation. There are a range of options to capitalize on this knowledge to support peer learning and countries in their policy and implementation efforts:

- *Education Policy Outlook: Infocus*: these short targeted reports could develop the rich information already gathered by the Education Policy Outlook.
- *Peer learning national seminars* on a reform topic or reviews that support the implementation of their reforms. This involves a short OECD mission, a seminar for key national stakeholders to discuss key areas for progress, encourage reflection and facilitate reform consensus and result in a Reform Draft Action Plan. This complementary deliverable is proposed for countries who request it. This option would need to be fully supported by voluntary contributions.
- *On line seminars/programmes* on education policy and implementation lessons for policy makers. Could build on the approach OECD-Harvard Seminar for Leaders in Education Reform modules undertaken for Mexico (2010) and Norway (2011).

27. Finally, it is also relevant to link this series to the Education Policy Country Reviews: the analytical underpinnings are similar and there is much cross-fertilisation on information and analysis of reforms and their impact. The Education Policy Outlook team provides input into Country Reviews and the findings from Country Reviews can also feed into the Education Policy Outlook. Countries can build on the analytical framework and comparative knowledge from the Outlook to look at their education system from a comparative perspective, asking the following questions: What are their challenges? What have they been implementing to respond? What are other countries implementing that could be relevant to the country and its specific context?

The Education Policy Outlook Comparative Report (2017-)

28. The Education Policy Committee and internal discussions call for the Education Policy Outlook to continue developing added value for countries and their policy makers. The first edition of the comparative report gathered information on policy trends, reform implementation and key characteristics of the education systems in the 34 OECD countries, combining data with their reform stories. Bringing together such a rich source of information in a systematic way, which includes a dataset of at least 450 education reforms across OECD countries, was a major accomplishment for the OECD Secretariat.

29. Some initial questions to guide this analysis further are:

- Have the types of reforms implemented changed or shifted?
- How are countries implementing their reforms? Are they evaluating and ensuring impact?
- Are they having success with their reforms?

30. Developing the analytical underpinnings will require:

- a) Preparing an initial working paper to discuss with countries on the research issues that can be included in the outlook, especially focused on policy evaluation.

- b) Building on the reform implementation template ([EDU/EDPC/RD\(2013\)5](#), *Education Policy Outlook: An overview on the reforms section and background literature review on implementing school improvement programmes*) current and upcoming projects at the OECD Directorate for Education and Skills interested in contributing with analysis of implementation of reforms can be included in the Outlook (e.g. ECEC, VET and the new planned survey on learning organisations).

Governance

31. During the consultation session on the future of the Education Policy Outlook (20 January 2015), participants suggested having an informal advisory board for the Education Policy Outlook, to get country engagement to steer and provide feedback on the content of the analysis. This would imply bringing together a small group of country delegates to discuss proposals, provide guidance and feedback and contribute to report to EDPC delegates.

32. Steering and guidance would be essential to provide a view on country policy needs, challenges and guiding regarding how the Education Policy Outlook can be most valuable for policy makers. More concretely, an informal advisory board can: a) review profiles structure and content; b) provide steering and support on the updating of profiles; c) contribute to selection and analytical framework on the topics to be covered in the Education Policy Outlook, such as evaluation and impact of reforms.

33. The informal advisory board could meet for short sessions around the EDPC meeting dates, as well as organise virtual meetings.

Resources

34. The series is covered through Part 1 funding. In addition, in-kind and financial voluntary contributions can contribute to enhance the project deliverables. A voluntary contribution by the European Union is planned to cover the completion of Education Policy Outlook: OECD-EU Country Profiles.

35. Additional voluntary contributions for the Education Policy Outlook can be as follows:

- Possibility for countries to second staff to the Education Policy Outlook team for 1-2 years to learn about education policy internationally by contributing to the design of the next edition of the Comparative Report and the Education Policy Outlook: Country Profiles.
- Financial voluntary contributions can be directed to enhance the *Education Policy Outlook: Reforms Finder*;
- Non-member countries can provide a voluntary contribution to do their *Education Policy Outlook: Country Profiles* for the next biennium;
- Voluntary contributions can also be targeted to organise international peer learning seminars.

36. For the 2017-2018 biennium, the EDPC rating exercise will determine the resources available for the series, whether to invest in a comparative edition of the Education Policy Outlook or whether to focus on revising the *Education Policy Outlook: Country Profiles*.

ANNEX 1: EDUCATION POLICY OUTLOOK POLICY LEVERS

Policy levers	Definition	Policy options	Policies
Students: Raising outcomes			
Equity (and quality)	Policies to ensure that personal or social circumstances do not hinder achieving educational potential (fairness) and that all individuals reach at least a basic minimum level of skills (inclusion)	Investing early on	Provision of quality early childhood education and care
		Tackling system level policies	Avoiding grade repetition, early tracking and student selection; managing school choice; developing funding strategies that address students' and schools' needs; designing upper secondary pathways to ensure completion.
		Supporting low-performing disadvantaged schools and students	Supporting school leadership; stimulating positive school climates; strengthening the quality of teachers; ensuring effective classroom learning strategies; linking schools with parents and community.
Preparing students for the future	Policies to help prepare students for further education or the labour market	Upper secondary	Flexibility in choice; ensuring quality across programmes; engaging communities, parents and the private sector; ensuring effective transitions into the labour market or further education.
		VET	Matching skills offered by VET programmes with labour market needs; adequate career guidance; quality of teachers; providing workplace training; tools for stakeholder engagement.
		Tertiary education	Steering tertiary education; matching funding with priorities; assuring quality and equity; enhancing the role of tertiary education in research and innovation; strengthening links with the labour market; shaping internationalisation strategies.
		Transitions	Transitions across education pathways and links to the labour market.
Institutions: Enhancing quality			
School improvement	Policies to strengthen delivery of education in schools that can influence student achievement	Learning environments	Class size; curriculum; instruction time; learning strategies; interactions in schools.
		High quality teachers	Recruitment, selection and induction; salary and working conditions; initial training; professional development opportunities and career paths.
		School leaders	Attracting, developing and retaining school principals in the profession; support and networks.
Evaluation and assessment	Policies to support measurement and improvement of school system's outcomes	System evaluation	Evaluation of the system as a whole and of sub-national education systems; programme and policy evaluation.
		School evaluation	Internal school evaluation; external school evaluations; school leadership.
		Teacher appraisal	Probationary periods; developmental appraisal; performance management; appraisal for accountability and improvement purposes.
		Student assessment	Formative assessments; summative assessments.
		Evaluation and assessment frameworks	Co-ordinated arrangements; governance, configuration/architecture; competencies and skills; use of results; implementation strategies and factors.
Systems: Governing effectively			
Governance	Ensuring effective planning, implementation and delivery of policies	Formal structures	Type of government; organisation of education system; locus of decision making.
		Setting objectives	Definitions of national education goals or priorities.
		Stakeholder process	Relevant institutions and engagement with stakeholders.
Funding	Policies to ensure effective and efficient investment in education systems	Economic resources in the education system	Public expenditure: GDP and share by education level.
		Use of resources	Time resources; human resources; material resources by education level.

Source: OECD (2012c), *Proposal for an Education Policy Outlook* (EDU/EDPC(2012)17/REV1).