

**IMPACT OF PISA 2006 ON THE EDUCATION POLICY  
DEBATE**

Laura Figazzolo  
Education International

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## EXECUTIVE SUMMARY

PISA 2006 has proven to have an enormous impact on the education policy debate at worldwide level. The following chapters are meant to explain how. First and foremost, PISA has been at the centre of the debate about national education policies, in many ways. On the one side, in fact, it has often managed to orientate governments' political choices for education. On the other side, it has also provided unions with valuable evidence in support of their cause. In any case, PISA has framed the debate on education between governments and opposition parties, and unions have often found themselves in the middle of this confrontation. Second, an increasing attention, by the media, to PISA has granted the survey continuous consideration, bringing it, and educational issues, in general, to the public awareness. Yet media have not acted as simple "mediators" of the results of PISA. On the contrary, by narrowing down the focus to rankings, they have often conveyed a very simplistic interpretation of educational issues, and, from this basis, have often operated as a proactive agent of the policy orientation promoted by the OECD, or for that matter, by the more conservative media. Moreover, media worldwide have generally promoted a "copy and paste" approach based on implanting the features of well-performing school systems into other (poorly performing) countries.

Unions are not opposed to international comparative research *per se*. However, the excessive focus of policymakers and media on PISA results as mere rankings has made unions more cautious. If PISA results are not explained nor analyzed in details, they can be interpreted in many different ways. Both unions and governments can employ PISA as a useful instrument, in whichever direction. In this sense, so far PISA has been used effectively in guiding, through its policy recommendations, national governments' policy directions in education towards an economic approach. The challenge now is to prove that PISA can be a means for redirecting the education policy debate towards quality and equity, achieved through publicly funded policies aiming at improving teaching and learning conditions.

## THE SETTING

### The OECD and PISA (2006)

1. The OECD **Programme for International Student Assessment (PISA)** is an internationally standardized test undertaken by random samples of 15-year-olds in schools. It is developed by the OECD and participating countries – all 30 OECD member countries, and a growing number of “partner countries” – 27 in 2006, making a total of 57. PISA is the best known international comparative study undertaken regularly in education today. Its results have a significant impact on education policy in participating countries and beyond. Its popularity is expanding with both governments and mass media. The general public wants to understand “what’s going on in education”, and governments want to demonstrate “progress in education” to their electorates. PISA represents an attractive instrument for both groups. It is a great news item for the media, who play the critical role of mediating the debate on the study results between the two above mentioned groups. As such, PISA is by no means a unique phenomenon. It is, rather, an example of the current trend of “evidence-based research”, which plays a central role in policy debates at OECD and in many countries.

2. In PISA, students are randomly selected to perform pencil-and-paper tests (around 400,000 students were randomly selected to participate in PISA 2006). PISA is not designed on the basis of national curricula and programmes, but it applies its own, innovative concepts to assess literacy and competencies in mathematics and science. Nor does PISA assess performance across the full range of education. The 2006 survey completes the first cycle of assessment of three subject areas - reading (PISA 2000), mathematics (PISA 2003) and science (PISA 2006). As mentioned above, PISA assesses the extent to which 15-yrs-old students near the end of compulsory education possess the key knowledge and skills for their full participation in society. PISA 2006 covers three main assessment areas: science, reading and mathematics. In each of these subjects, tasks ask students to demonstrate literacy (i.e. understanding of concepts), knowledge of the domain (i.e. physical systems, living systems, earth and space, technology), competencies (i.e. identifying scientific issues, explaining phenomena, using scientific evidence), and understanding of contexts and situations. On the basis of this methodology, PISA 2006 develops detailed student performance indicators and correlates them with background data about the students and schools, and, from those correlations, it draws policy conclusions.

3. In PISA 2006, Finland scores at the top on the integrated science scale, reaching 563 points, followed closely by traditionally high performing countries in PISA (Hong Kong, Canada, Taipei, Japan, Australia, the Netherlands). Surprisingly, Estonia ranks fifth. At the bottom end of the scale, developing countries like Kyrgyzstan, Qatar, Azerbaijan, Tunisia, and others achieve less than 390 points. Yet the picture is not that simple. Results are presented in terms of the percentage of students reaching six different proficiency levels, constructed on the ground of students' ability to use science competencies. Data show that there is a great variation in the distributions across the different proficiency levels between countries; however, the gap between students' distribution across proficiency levels within countries is greater than the gap between countries. Although there are differences between countries' performances, this gap is very narrow. While some countries show remarkable differences – such as Finland, at the top, and Israel, Chile, Turkey, Brazil and Mexico, significantly below –

most of the results of PISA 2006 range within a 30-point margin above and below the average level of 500.

4. The distribution of students in the different proficiency levels in individual countries appears to be the most significant data, as it relates to both quality and equity in the education system. For example, in Finland more than half of students are in the top three levels, while in Kirgizstan more than 80% are in lowest levels 1 and 2. Data suggests that countries with higher national incomes tend to perform better in science; a significant proportion of the variation in countries' mean scores can be predicted on the basis of their per capita GDP. However, this does not necessarily imply a causal relationship between the two – since many other factors are involved – yet countries with higher national incomes seem to have a relative advantage. The report goes further, comparing actual spending per student with the average performance in science: there is a positive relationship between the two, but this relationship appears to be less significant than the correlation between national income and performance. PISA reports somehow overemphasize the fact that, apparently but arguably, national income does not affect the attainment of good results; this is one of the crucial presumptions to keep policymakers and the broader public interested, as they can hence find out how to achieve better results without huge investments. This is another element that makes PISA so popular. Yet this argument supports the policy of reducing public expenditure in education and, as a consequence, cannot be accepted by teacher unions, who are the first advocates in favour of more investment.

5. This policy direction of PISA can be better understood in the context of other OECD major projects in education, for example *Education at a Glance*, the annual survey of education indicators in OECD member countries. According to the OECD, governments are paying increasing attention to international comparisons as they search for effective policies that enhance individuals' social and economic prospects, provide incentives for greater efficiency in schooling, and help to mobilize resources to meet rising demands. Consequently, the OECD Directorate for Education devotes a major effort to the development and analysis of quantitative, internationally comparable indicators that it publishes annually in the abovementioned *Education at a Glance*. These indicators are intended to enable educational policymakers and practitioners alike to see their education systems in the light of other countries' performances and, together with OECD's country policy reviews, are designed to support and review the efforts that governments are making towards policy reform. We will return to this below, in relation to PISA 2006, specifically<sup>1</sup>.

6. When analyzing PISA or other OECD research projects on education, it is useful to bear in mind another important aspect: PISA focuses on the linkage between learning outcomes and labour market needs. *Education at a Glance 2008* puts participation and attainment rates in the context of the increase of highly skilled jobs. For the OECD, the population's level of educational attainment is a commonly used proxy for the stock of "human capital", that is, the skills available in the population and the labour force. The OECD, comparing different countries' educational attainment levels, presupposes that the skills and knowledge imparted at each level of education are similar in Mexico, Korea or Sweden, to name a few participating countries, which is another underlying premise also in PISA – in terms of knowledge and skills 15-year-olds are supposed to acquire in order to be successful, with an even broader range of

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<sup>1</sup> See paragraphs 8 and 9

subjects. Even if we would accept this “labour market” paradigm as the main criterion for judging the quality of learning outcomes, it seems self-evident that knowledge and skills of the “human capital stock” vary substantially among countries, depending on their industrial structure and general level of economic development. Nevertheless, the terminology used in *Education at a Glance*, i.e. “human capital stock”, is definitely debatable.

7. PISA 2006 pays great attention not only to the quality of outcomes but also to the equity of their distribution – to learning opportunities. Although the report does not show a direct causal correlation between a disadvantaged economic background and poor performance, socioeconomic background appears to play an important role. PISA 2006 acknowledges that the achievement of an equitable distribution of learning opportunities is a key stated goal of public educational policies in most countries. Equity is compatible with quality.

#### “Policy implications” of PISA 2006

8. What makes PISA different from the other international comparative surveys in education such as the TIMSS and PIRLS studies – conducted by the International Association for the Evaluation of Educational Achievement (IEA) since the late 1950s – is its clear policy orientation. PISA is not only research, for it contains key policy recommendations: “it aims to provide a new basis for policy dialogue and for collaboration in defining and implementing educational goals”<sup>2</sup>. This, as highlighted in the previous section, makes it a powerful tool for political influence.

9. In other words, even if “school and system characteristics cannot provide precise policy prescriptions, they can address educational policies correlated to high performance”<sup>3</sup>. PISA provides policy recommendations for governments for them to improve their country’s education system’s performance and to enhance its competitiveness. PISA’s “implications for policy” are, in fact, led by the principle of increasing school efficiency, which is a rather economic (and neo-liberal) approach to national education. For instance, higher performance may be associated with privately funded schools and with schools competing for students – even if this effect disappears when students’ socioeconomic background factors are taken into account. *Education at a Glance* confirmed the latter finding. Accountability is regarded as a key factor in improving school performance, in particular external accountability combined with external standards. Keeping track of student achievement at a public level seems to be associated with high student performance. As part of the PISA 2006 assessment, ten OECD countries complemented the perspectives of pupils and school principals with data collected from pupils’ parents. These data provide important insights into parents’ perceptions of their child’s school and instructional quality, and of how such perceptions relate both to student performance and to the impact which social background has on learning outcomes. For example, compared with 15-year-old students who had not, at the age of 10, read books on scientific discoveries, students who had done so performed, on average, 45 score points higher in the PISA 2006 science assessment, more than the equivalent of a school year, and this advantage remained significant, at 35 score points, even after taking into account socioeconomic factors. The report makes clear that parents’ perceptions and attitudes do

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<sup>2</sup> OECD PISA 2006, p.3

<sup>3</sup> OECD PISA 2006, p.275

matter. However, if parents' positive attitude towards high standards and discipline in their child's school seems to be positively related to higher performance, their satisfaction with teachers work and feedback on their child's progress is not or is even negative! Although the report does not say it, the consequent conclusion appears to be clear: parents' perceptions of learning in the family, high standards and good discipline in school help to improve performance, while "satisfaction" with teachers, curriculum, methods and reporting on progress do not give an "added value" to students' achievements. Any reader who is policy-oriented may conclude that these areas – namely teachers' and schools' accountability to parents – can offer a space to "boost overall performance levels", which is suggested as a possibility by PISA 2006.

10. Those countries where schools have a greater autonomy in budgeting tend to perform better – the association between the different aspects of school autonomy and student performance within a given country is often weak, though. The way in which students are selected by and grouped within schools does make a difference in their results; early tracking, for example, reinforces the impact of socioeconomic background on the results of students, increasing the gap between low and high performers. However, PISA 2006 also suggests several policy directions to address both quality and equity. In particular, targeting low performing schools and low performing students within schools (through early prevention or recovery programmes for students at risk, for instance) can be a useful approach. Similarly, educational policies should target disadvantaged children through special curricula and additional resources. Finally, the expansion of education opportunities for all students, especially in terms of raising education quality standards, is recommended (providing full school-day, increasing learning time, improving teaching techniques, etc).

11. These PISA recommendations are likely to have an extremely significant impact on governments, influencing their policy orientations. In fact, the OECD is able to exert a sort of peer pressure and “soft governance” on national governments, in virtue of its mandate and, in particular, of its status of authoritative impartial source of evidence. The OECD does not have a legally binding mandate on member countries in the field of education, and cannot use regulations and sanctions; however, it does act through “soft” power instruments, such as recommendations, guidelines, policy orientations. This specific feature represents a strength in a new policy environment where “soft power” instruments and peer pressure play an increasingly relevant role, and, specifically, given the organization’s capacity to develop international comparisons based on sound data gathering mechanisms that are globally recognized and accepted.

### **Education International’s position and perspective on PISA (2006)**

12. The impact of PISA through the media is undeniable. Given its policy-oriented approach, PISA has become a reference in debates over educational policy in most of the 57 participating countries. For these reasons, if no other, education unions are giving PISA attention. There are other reasons for giving attention to PISA, though. Statisticians and researchers working with the OECD to produce the report have succeeded in drawing out a host of interesting correlations between the performance of 15 year-olds, their socioeconomic backgrounds and certain characteristics of school systems, presenting them in tables which allow comparisons among the participating countries. These data have been useful for education unions, too.

13. However, the data in the comparative tables can be simplified by media into “league tables” of country rankings. The same data can be used by politicians to serve their political agendas. One of the lessons to be drawn from a review of the PISA 2003 experience is that Education Ministers and their advisers, who get advance notice of the report, will try to put “spin” on the data to suit their own purposes. When briefing the media – or preparing information on union websites and in union journals – it is important to keep PISA in perspective.

14. PISA 2006, in particular, is about much more than ranking of countries: it reveals interesting data on correlations between the performance of 15 year-old students in science as well as reading and mathematics, their socioeconomic backgrounds, and the organization of schools. PISA is based on a necessarily simple set of questions which can at best provide a “snapshot” of performance in certain skills among 15 year-old pupils, of their socioeconomic backgrounds, and of certain characteristics of school systems. The correlations and international comparison produce interesting, sometimes fascinating data, but it should not be forgotten that the basis for this data is rather simple, and it does not convey the complexity nor the breadth of education. PISA does not transmit the total picture of education: it can help to stimulate debate about education, yet any attempts to use the PISA results to support already developed political agendas would be a misuse of the report and the data it contains. Moreover, we should not forget that, so far, PISA has dealt, throughout its three cycles, only with particular subjects that could be universally measured and, hence, comparable; even in terms of range of school matters, hence, PISA does not compare and measure the totality of subjects that 15 year-old pupils have been taught up to their level of education. EI is committed to a broad concept of education, enabling people “to achieve their fullest potential in life, taking into account their individual abilities” (5<sup>th</sup> World Congress of EI, Berlin, 2007 Resolution on *The Strategic Role of Educators*). PISA does not measure capacities in foreign languages, in the humanities, including geography and history, nor in the arts or music, nor indeed in sport. Nor can it measure less tangible but critical educational outcomes such as capacity for teamwork, learning how to learn, or understanding other cultures. And PISA is limited to the 15-year-olds age cohort.

15. EI also considers that any evaluation of the quality of education provided by any public education institution must not be based solely on student achievement test scores but take into account a range of factors related to the context of the school and the class, such as students' capacities, skills, socioeconomic circumstances, financial and learning resources, facilities, school administration, class sizes and school organisation characteristics.

16. This said, we should not deny the possibility of using PISA reports in an integral, yet creatively positive way. The wealth of data and the variety of conclusions of PISA allow space for sound interpretation from a unionist point of view, as well. A better understanding of the real role and scale of PISA potential impact, which we have developed over the past years, leaves no doubts that the use of PISA for informing policymaking is not only unavoidable, but can be beneficial for teacher unions' cause. This report acknowledges it through several examples.

17. Unions' research work has an important role to play in at least two ways. Firstly, analyzing PISA and linking its results to national contexts, in order to prepare explanatory information

for union leadership and for membership. Secondly, compiling other studies and literature on issues of quality and equity, and of pupil achievement, so as to balance and, if necessary, challenge PISA results with a broader picture. EI member organizations are encouraged to establish contact with PISA national project managers and national committees. In a few countries, unions have been able to participate in the work of the national committees, and their contributions and expertise have won respect. In other countries, cooperative relations have been established, enabling unions to exert positive influence while gaining insights into PISA processes at national level. EI believes that the key lies in linking unions' work at national level to the activity of EI and TUAC at OECD level.

### **Study on the impact of PISA 2006 on the education policy debate**

18. Education International has been developing its work on PISA during the last four years. PISA is the OECD flagship study, gaining increasing popularity among general public and policymakers worldwide. A rising number of countries are participating in it. EI analysis of media reactions after PISA 2003 found that PISA is becoming a reference for education quality internationally. In addition, the internal tendency of PISA is inevitably developing, in the future, towards teachers' impact profile, as well as expanding into other levels of education. As such, PISA is becoming a serious issue to be considered by education unions. Before the launch of PISA 2006, EI commissioned a special study on media reactions to the previous PISA cycles (by Ditte Soebro), as part of EI information campaign to prepare unions for the launch of PISA 2006. This paper, however, was limited in its scope, as it did not investigate and analyze unions' reactions and policies *vis-à-vis* policymakers and media, nor did it inquire into the overall impact of PISA on the education policy debate. The major focus of that paper was, rather, the setting of the context and pointing to the factors that enforce the impact of PISA study itself.

19. In 2008, the OECD started its own policy impact analysis of PISA, inviting unions' participation, and EI helped facilitating this activity. Nevertheless, the layout of the OECD survey and the questionnaire design raised serious questions about content, intentions, potential use of the survey, as it may or may not be beneficial to unions cause or may not reflect their opinions fully – allowing, at the same time, the OECD to claim legitimacy in terms of unions' involvement. These considerations, expressed during the TUAC Working Group on Education meeting, Paris 8-9 April 2008, led to the development of a recommendation to EI to undertake its own full scale study of impact analysis and evaluation of PISA from unions' perspective. The following study is a follow up to this recommendation. At the same time, it draws from EI previous work on PISA, particularly focusing on the outcomes after the publication of PISA 2006.

#### *Aim*

20. The study aims at mapping and analyzing the policy impact of PISA 2006 on the education policy debate at both national and international level from education unions' perspective.

#### *Scope*

21. A paper analyzing the impact of PISA 2006 on the education policy debate, with a specific focus on how media reported on PISA and on how governments draw from its conclusions. Hence, how unions perceived and responded to PISA results and the reforms put in place after its publication, with a focus on relevant case studies (Mexico, Italy, France, the US, Germany, Ireland, the UK, Australia, Norway, Finland, among others). The study will also investigate how unions consider the work done by EI on PISA, in order to identify possible future strategies.

#### *Methodology*

22. The study is constructed on the basis of the following methodology:

- Reading, classifying and analyzing *Meltwater News*<sup>4</sup> articles on PISA in order to investigate how the media worldwide reported on PISA; about 12,000 articles collected between December 2007 and October 2008
- Developing and disseminating a questionnaire to be sent to EI affiliates in PISA countries in order to investigate their level of involvement in PISA, their interface with the media and policymakers on PISA, their perception on the content of PISA and its impact on policy in their respective countries. A short section asking unions what is their perception of EI work on PISA was also included
- Conducting interviews with unions particularly involved in PISA and who can represent interesting case studies
- Analysis of the results and report writing, presentation and integration of potential feedback
- Identification of EI's potential future strategies on interaction with PISA.

#### *Critical questions*

23. Some of the critical questions to be answered are:

- How has the media reported on PISA 2006? How important are rankings in reporting about PISA?
- Has the media had an impact on education policies/policymakers?
- Which have been the main educational policies suggested in name of PISA? Are they beneficial to unions' cause?
- Is there a link between reporting about rankings and educational policies?
- What is unions' perception of the results of PISA 2006? How did unions' perception correspond to media analysis?
- How did unions react a) to media reports on PISA and b) to educational policies eventually derived from them? Have unions been involved in the whole PISA process? What has been their interface with media and policymakers?
- Overall, what has been the actual impact of PISA 2006 on the education policy debate at worldwide level?
- How do unions see their role in relation to PISA?

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<sup>4</sup> *Meltwater News* is an online media monitoring agent, which daily monitors thousands of online sources globally and identifies those that cite or mention PISA

- What do EI affiliates think of the work done by EI on PISA so far and how they would like it to develop?

*Respondents*

24. The questionnaire was sent to all EI Research Network members, to all participants in EI annual PISA consultancy meetings in 2006 and 2007, and to all official EI member addresses in PISA 2006 participating countries (57). We received 32 replies from 25 countries, allowing for a good geographical representation of unions and countries involved in PISA 2006.

## IMPACT OF PISA (2006) ON THE EDUCATION POLICY DEBATE

### PISA 2006 and education reforms

25. PISA 2006 has hugely affected the education policy debate, at worldwide as well as national level. On the one side, it has constituted the point of reference, for governments, in their educational reforms – both centre-left and centre-right governments, but very often with an “economic” approach, i.e. testing pupils, evaluating teachers, with reforms inspired by efficiency or competitiveness criteria. On the other side, PISA has also been employed by unions and opposition parties to blame the government and attack its educational policies.

26. Policymakers, in government and in opposition, are eager to suggest reforms in education, not necessarily because of PISA findings, but increasingly and mostly with a reference to PISA latest results as a source of legitimacy for their actions: "we are going to propose such and such reforms, because, as shown in PISA, our country is lagging behind...". In fact, half of the respondents report that their government has launched reforms or initiatives in education as a consequence of or with reference to PISA 2006: rankings and results have been used to justify and sustain these actions.

27. This finding is supported by both the analysis of *Meltwater News* and the evaluation of key educational reforms undertaken by different governments in various countries. The *Meltwater News* database shows that around 27-28% of the articles citing PISA worldwide use the survey as a reference to advocate reforms. Second, we have cases of reforms launched by both centre-right and centre-left governments that have employed PISA results as a point of reference, if not as a means for justifying these reforms. At the same time, opposition parties (and unions, as well) have often used the very same PISA results to refute governments' arguments. Unions have often been caught in the middle of this political game between government and opposition.

### PISA 2006 and “efficiency/competitiveness-oriented” reforms

28. In many cases, the reforms put in place after the publication of PISA, by both centre-right and centre-left governments, have taken the efficiency/competitiveness-driven approach recommended by the OECD within PISA. Here are some interesting cases.

29. Mexico is a striking example. It is a “neo-liberal-looking” reform that has not only used PISA as a point of reference, but has directly involved the OECD in its formulation and implementation. The *Alliance for educational quality* was launched by Felipe Calderón in May 2008. It is a very peculiar reform, as it is based, for the first time, on an agreement between the government, the education union (SNTE) and the OECD itself. As EMPRA (*Emerging Markets Political Risk Analysis*) states in its evaluation of the reform, its launching “responds to a series of growing pressures. Primarily, Mexico had one of the worst performances in the last OECD PISA, scoring in last place among the OECD countries [...] According to the OECD report, more than 50% of Mexican students have ‘notoriously insufficient’ levels of knowledge in these areas [mathematics, computer science, reading] and lack the fundamental skills to

continue on to higher education”<sup>5</sup>. The aim of the reform is to “guarantee first-rate teaching for all Mexicans, as the best means of ensuring equal opportunities, promoting economic growth and hastening the country's democratic development to make equity a reality”<sup>6</sup>. The poor results of Mexico in PISA 2006 were more than once used as a justification for the implementation of the reform by the government as well as by the media, and, of course, by the OECD itself. The *Alliance for Quality Education* is based on five main guidelines: modernizing school infrastructure and equipment, improving teaching standards and performance, ensuring that students do not drop out of school for socioeconomic reasons, skills development and consolidating evaluation as a key element, by following up the commitments contained in the Alliance by implementing a system of checks and balances. Many of the “policy implications” contained in PISA 2006 can be found here, especially when it comes to “improving teacher performance” and “consolidating evaluation”. This reform combines different typologies of initiatives. For example, Microsoft is largely involved in this modernisation effort: the company provides, in fact, about 103,000 PCs to 87,490 schools across the country, which *per se* could be beneficial to the education system, leaving aside the concerns related to the existence of long-term commercial interests. Furthermore, under the agreement, teachers would be hired and promoted according to how they fare in a set of tests devised and marked by a new independent body. The problem of teachers’ quality is not a new issue in Mexico, as *The Economist* reports: “The main problem lies not with salaries for teaching, which are competitive with other jobs in Mexico, but with the quality of teachers. The government has been trying to solve the problem since 1992, when it introduced annual bonuses linked to teachers’ participation in training courses and their scores on tests. This system is far from perfect. A study last year by the Rand Corporation, an American think-tank, found that the tests given to teachers required “only low level cognitive responses, while the criteria for evaluation were fuzzy and subject to manipulation”<sup>7</sup>. These developments, absolutely in line with the policy recommendations advised by the OECD, seem to be particularly questionable when it comes to guaranteeing the curricular autonomy of schools and of teaching personnel – i.e. when education quality is at stake. The launch of the *Alliance for Quality Education* has triggered a series of protests, by teachers and, less, by parents; strikes have been called, party propaganda from all the main Mexican parties has been burnt, state education offices occupied, encampments erected in the capital city of every active state and school students have offered their solidarity. Teachers say that the *Alliance* will strip them of any kind of security in their positions and jeopardize their ability to plan classes.<sup>8</sup> In any case, the *Alliance* is currently running into difficulties, and it is not clear, yet, if and how it will be implemented.

30. In the United States, a disappointing performance in PISA inspired a self-reflection on the American school system that, in turn, translated into a reform largely dominated by the logic of increasing efficiency of the system to augment US competitiveness. While not specifically due to PISA 2006, the Congress passed a bill that President Bush signed into law in May 2007, the *America COMPETES Act*, designed to improve American competitiveness by an increased focus on and investments in math, science, and technology, including increased new programmes and

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<sup>5</sup> *The Persistent Absence of the Educational Reform*, 01/06/08 EMPRA, [http://empira.net/report\\_02.html](http://empira.net/report_02.html)

<sup>6</sup> Press release *Federal Government and SNTE Announce Alliance for Quality Education*, on 15 May 2008, by the Cabinet of the President of the Republic of Mexico, <http://www.presidencia.gob.mx/en/press/?contenido=35579>

<sup>7</sup> *Education in Mexico: Testing the teachers*, *The Economist*, 22 May 2008

<sup>8</sup> *Mexico: Morelos teachers’ strike continues with national support*, 3 October 2008, [www.libcom.org](http://www.libcom.org)

investments in math and science education and teacher preparation: “The America COMPETES Act (P.L. 110-69) responds to concerns that the United States may not be able to compete economically with other nations in the future due to insufficient investment today in science and technology research and in science, technology, engineering, and mathematics (STEM) education”<sup>9</sup>. The details of the Act in relation to education are contained in the Annex I. This law was to a large degree the result of a publication, *Rising Above the Gathering Storm: Energizing and Employing America for a Brighter Economic Future*, which extensively cited PISA results, as one of several data sources, to make the case that “U.S. advantages in the marketplace and in science and technology have begun to erode. A comprehensive and coordinated federal effort is urgently needed to bolster U.S. competitiveness and pre-eminence in these areas so that the nation will consistently gain from the opportunities offered by rapid globalization...”. This overemphasis on the U.S. ranking on the PISA test compared to other countries represents an issue of concern, as such simplistic ratings, which focus solely on the relative test scores, fail to take into account the range of other factors affecting children and education, including health care, nutrition, housing, and so on.

31. France is another case of reform inspired by the logic of “increasing efficiency”. The school reform launched by Sarkozy under the 2007 RGPP (*Révision Générale des Politiques Publiques*, General revision of public policies), under the labels of more efficiency, better performances and re-founding of the public system on a different basis, calls for a drastic reduction in public funding in education, with consistent cuts in terms of teaching personnel. The French Minister of Education, as well as the national media, often refers to PISA 2006 results as a point of reference for supporting this reform. In this case, as well, the measures envisaged by Sarkozy’s government follow very much the path indicated by the OECD in PISA.

32. In Germany, PISA results have been used to justify a new focus on “testing testing testing”, i.e. “result-oriented evaluation”. While PISA 2006 has had, so far, only a marginal impact, PISA 2000 and PISA 2003 had a significant effect on the following government’s decisions on education. The education ministers launched the so-called “seven action areas” to make school and learning quality better. These seven priority areas of the *Kultusministerkonferenz* with regard to the results of PISA 2000, as published in December 2001, were the following: (1) improvement of language competence as early as pre-school education especially for children with a migration background; (2) strengthening of the link between the pre-school sector and primary school with the aim of an early school entry; (3) improvement of primary education and the continuous improvement of reading literacy and basic understanding of mathematical and scientific concepts; (4) efficient support of educationally disadvantaged children with particular regard to children and youths with a migrant background; (5) thorough development and assurance of the quality of teaching and schools on the basis of binding educational standards and result-oriented evaluation; (6) improvement of professionalism in teaching with particular regard to diagnostic and methodical competence as an element of systematic school development; (7) expansion of the provision of school and non-school activities for the whole day with the aim of increasing opportunities for education and support with particular regard to pupils with educational deficits and especially gifted pupils. “Testing, which helps to make

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<sup>9</sup> CRS Report for Congress, *The America COMPETES Act and the FY2009 Budget*, 20 March 2008

schools more accountable, plus greater autonomy seem to be two of the surest ways to improve schools' performance"<sup>10</sup>.

33. In Ireland, PISA has been and still is a catalyst for change in favour of more testing and evaluation. All PISA cycles have been used in order to justify specific actions or initiatives undertaken by the government, either before or after the publication of the results. For example, following PISA 2003 – focused on mathematics – there was a national inspection on the teaching of mathematics, which led the National Council for Curriculum and Assessment to introduce significant changes into the math curriculum and teaching methodologies, which are now being implemented. PISA 2003 provided further proof that the national standard of mathematics education had to improve. In this sense, the PISA 2003 report served as catalyst for changes, upon which there had already been public discussion, to take place. On the other side, the knowledge that PISA 2006 would focus on science also served to expedite the changes that took place in the curriculum for lower secondary science education in 2003. In other words, PISA has been a driving force for reforms, bearing in mind, though, that the current economic climate is not likely to see changes introduced which might mean spending more on education. For example, Irish schools do not have laboratory technicians. While a good case can be made for the abovementioned provisions from the quality perspective, current public finances will not allow additional expenditure of this nature.

34. Italy is an example of how PISA results have been used by both the government and education unions to support the respective positions and policies. PISA results have been used, on the one side, by Berlusconi's government to advocate a rather neo-liberal reform of the country's education system, and, on the other side, by unions and the opposition to criticize this very same reform. As part of the measures to increase the coffers of the government by cutting down public spending and increasing income taxes, Prime Minister Silvio Berlusconi plans to get rid of teachers in most specialised subjects and pare down primary school classes to one teacher each, starting in 2009. The reform would also cut the school week by almost half, inconveniencing working parents of Italy's 2.8 million children aged 6 to 10. If turned into law, the reform is essentially reverting Italy's education sector to a schooling model cast aside 30 years ago. It will perhaps help save 7 billion euros a year for Europe's most-indebted country, according to Education Minister Gelmini, but will carry the risk of ultimately ruining the future of the next generation. According to the FLC-CGIL, at least 140,000 jobs, including 80,000 teaching positions, will go. This implies that the assistance to children with disabilities will disappear, class size will increase significantly and some schools will have to close down making it travelling distances for some children much longer. With another law proposal, the government also aims to reduce one-third of the current resources allocated to public universities and reduce at least 10% of their research staff. At present, as many as three primary school teachers take turns with the lessons, which run from half past eight till four in the afternoon. As of 2009, classes will be run by one teacher working a 24-hour week, similar to the schedule three decades ago, and lessons stop at half past twelve. Working mothers will find it hard to cope with making a living and taking care of their children. Apart from having to look for childcare facilities, which are few and expensive in Italy, working mothers will not be able to choose to work part-time by law as is current the case, but will be subject to the decision of their employers. Other measures such as stricter conditions for medical leave and

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<sup>10</sup> *German education: Bottom of the form*, *The Economist*, 16 October 2008

parental care will add on to the burden of working mothers. Moreover, the reform will introduce a yearly bonus for ‘good teachers’ (between 5,000 and 7,000 euros per year) in order to foster the (bad) quality of the Italian school system. This argument (cut on spending and promote evaluation systems to increase efficiency), inferred by the government also from the OECD data then used as one of the elements justifying the reform, has been rejected by education unions and the opposition, who claim that the data presented by the OECD, notably within PISA, do not take into account the peculiarity of the Italian system. For example, the fact that Italian pupils, on average, spend more hours per days at school and have more school days than pupils in other OECD countries; or the very high presence, within schools, of teachers for children with special needs; or the particular situations of local communities schools. In other words, these data are used by the government to provide justification for the neo-liberal reform it wants to implement. Another worrying proposal, once again justified in the light of OECD data (since immigrant students perform worse than national students as a result, very often, of linguistic problems), refers to the creation of special classes for immigrants only, in order to help them to learning Italian and to “catch up” with national pupils. This legislative proposal, which, at the time of writing, has just been approved by the Parliament, has been widely defined as a “segregational” measure that would make even more difficult, instead of contributing to, the integration of immigrants children in the Italian school system.

35. Australia is a similar story: the PISA data have been largely used by different actors in the educational debate in different ways to support their pre-existing positions – i.e. the Australian government has used it to sustain an increasing focus on testing and evaluation. The 2006 data have informed debate in a similar manner to previous years, although there has been increased emphasis on Australia’s poor performance in equity and greater than OECD average difference in educational achievement related to social background. The Federal Education Minister has quoted the small fall in Australia’s position on the PISA rankings in support of her own already existing agenda. As such, it cannot be said to have led to changes or reforms that probably would not have taken place anyway. For example, a discussion document *The Future of Schooling*, released last year by the joint Labor Governments of the States and Territories, makes considerable use of the PISA data, noting what it calls the “long tail of underachievement”, or Australia’s relatively poor performance in equity and greater than OECD average differences in educational outcomes related to social background. It does not, however, make what would appear to be a logic link between this and the structural inequities of the Australian education system, the public/private divide, or the under-funding of the public education system, arguing instead for greater testing accountability regimes and a greater emphasis on school and teacher quality. Under the Labor Federal Government, this document forms the basis of the creation of a new *National Goals of Schooling* to be the ground for Federal, State and Territory education policies in coming years, which are leaning towards testing accountability regimes rather than policies aimed at addressing educational inequity. One of the major educational changes recently has been the establishment of a national testing regime, instigated by the previous conservative Federal government and implemented under the new Labor Government, under which students in Years 3,5,7 and 9 undertake national standardized tests in literacy and numeracy. This is a dangerous means of assessing school or teacher performance which could lead to a narrowing of the curriculum, the further exclusion of disadvantaged students from education and other educationally detrimental outcomes, in contrast to sample testing which could inform policy appropriately and determine the needs of

student communities. Notwithstanding the dangers associated with national full cohort testing, however, Australia continues down the path of census, mass standardized testing. Debate in the media and elsewhere has revolved around the use of the testing data and its disaggregation on a school by school basis, and while PISA data have been quoted in support of various positions, such data have been used to support positions and policies that almost certainly would have evolved in a similar manner in any case.

36. In Poland, the union's attitude towards PISA has changed substantially over the last years. Polish students have made a considerable progress in literacy skills and the government, as well as international experts, has perceived this development as a great success, since in no other participating country the progress has been so significant. However, according to ZNP the issue in relation to PISA is that education experts (the minister and his counselor) are not as competent as they should be for dealing with such a study. They use the PISA keyword to justify their own initiatives, for example the elaboration of a new core curriculum. ZNP claims that this places the union in an unpleasant situation, as the union does not intend to use PISA to reach some short-term goals. Poland was one of the countries chosen by the OECD for carrying out the evaluation of the impact of PISA on education policy. Jozef Ritzen (ex Minister of Education, Culture and Science of the Dutch government, former member of the World Bank and, at present, Rector of Maastricht University) was the responsible for the study in Poland. During his visit to Poland in June 2008, he met representatives of trade unions, who informed him about their opinions on PISA, gave him the material they had prepared in relation to the study, and discussed with him the impact of its results on the Polish government policy. In this case, unions' opinions about the importance of comparative studies were in accordance with the opinions of the Ministry representatives.

37. The abovementioned reforms were mostly inspired or motivated by the national results in PISA, and led by, first, the need of improving performance and, second and more significant, by an efficiency- and competitiveness-driven approach, which is, as described in the introduction, the approach suggested within PISA. PISA has different levels of impact: while everyone may agree on improving performance, how to do it creates space for interpretation. Very often, this has entailed the creation of evaluation systems for pupils and teachers, limiting the autonomy of schools, more inspection of schools and teacher work in order to raise accountability, budgetary adjustments and/or more parental freedoms, and more prescriptive teaching guidelines. Sometimes, it has also implied the opening of specific additional resources and support measures to particular problematic areas (e.g. immigrant children, children with disabilities or behavioral troubles, for instance) or subjects (math and science in Ireland, for example). It can be argued that the most part of these reforms – such as limiting the role of the government (“small state”), focus on setting rules and measurements of outcomes rather than provisions for resources – are in line with a general “neo-liberal” oriented approach to policymaking. In most cases, we are talking about centre-right governments, which are, commonly but not exclusively, the ones proposing these reforms with reference to PISA results – even if, in the last decade, very often the clear-cut difference between policies of centre-right and centre-left has diminished.

#### Learning from positive experiences

38. What constitutes a major apprehension is the fact that unions have, generally, not been consulted by policymakers in the process of preparing these reforms – with very few exceptions, namely Ireland. Only 12 respondents say they have been contacted by policymakers, mainly to explore further implications of the results and – worryingly – a few unions refer that they have been consulted by politicians only to promote, among schools, the participation into the next PISA cycle. The majority of unions did not contact policymakers to comment on PISA, and the few who did (almost one third) did it in order to offer their perspective on the results. Yet some positive examples of fruitful collaboration between governments and unions do exist.

39. Ireland is one of the cases where unions and the government worked together in a positive way following PISA results. Of course, the cooperation has been made easier by the achievement of good results in PISA, but, nonetheless, both parties maintained a positive attitude towards further improvements. Other, even more influential, factors have played a role, too. First, the existence of a formal State examination at the end of lower secondary education provides a well recognized “benchmark” for measuring national standards. In addition to the publication of results in this examination, Chief Examiners’ reports are issued in various subject areas – these are given wide media coverage and allow a coherent debate to take place on aspects of teaching, curriculum and achievement at this level. In this sense, the publication of another set of achievement data, i.e. PISA on 15 year-olds, has not caused a controversy but rather added to an ongoing debate on how to improve the quality of teaching and learning. Second, the partnership model of decision-making in relation to curriculum and assessment is very significant. The National Council for Curriculum and Assessment is established by law and is mandated to represent the partners in education and to develop the curriculum and assessment framework for primary and post-primary education. The partners include the State (representatives of the Department of Education and Science and State Examinations Commission), the third level education sector, the parents’ bodies, the school management bodies, the teacher unions, the Irish Congress of Trade Unions and the Irish Business and Employers’ Confederation. This partnership model means that there is ongoing dialogue across society about education. This shared dialogue implies that the main actors in society are well informed about the education system and therefore do not engage in controversial discussions or criticisms without a solid reason. The publication of PISA is taken very seriously by all partners and is regarded as an opportunity for continuing the social dialogue on education. In this sense, the debate on PISA is measured, rather than acrimonious. Third, the Irish Business and Employers’ Confederation has appointed two senior personnel to its Education and Social Policy Unit. This Unit is in regular professional consultation and dialogue with the teacher unions and other representative bodies. It participates in various education conferences, and most recently hosted its own Conference on teacher professional development. This employers’ agency – which is a highly visible and influential social actor – takes a very active role in ongoing education debates, most recently in relation to the need to increase spending on ICT in schools and on the need to invest more resources into the teaching of science in schools. In this regard, it takes a professional – rather than a political – approach to the PISA reports.

40. In the United Kingdom, unions have been able to use the findings of PISA 2006 to promote their cause. First, they have used the findings to lobby against the government’s argument in favour of the expansion of different types of schooling, highlighting that countries with a diverse schooling system do not perform better than the others – in other word, “there is no

international evidence in favour of selection". In this sense, PISA findings became part of unions' position against the government's idea of further expansion of school selection. Moreover, all PISAs were used by the government as an argument for the creation of the Masters in Teaching and Learning (MTL), which will be soon tested in three universities in the North West of England. The MTL was largely inspired by the vision of Michael Barber – former Chief Adviser on Delivery to the former British Prime Minister, Tony Blair, responsible for the oversight of implementation of the Prime Minister's priority programmes in health, education, transport, policing, the criminal justice system and asylum/immigration – as presented in the 2007 publication *How the world's best-performing school systems come out on top* (McKinsey&Company, September 2007). Under the motto "the quality of an education system cannot exceed the quality of its teachers", the publication highlights the fact that the best performing school systems attract the most able people in the teaching profession, i.e. they recruit their teachers from the top third of each cohort graduate from their school system: the top 5% in South Korea, the top 10% in Finland, the top 30% in Singapore. In Finland, in particular, all teachers have a Master's degree. Hence the creation of the MTL in order to enhance the quality of the teaching staff in England. However, while the government's proposal intends to make this master programme compulsory for teachers, unions are arguing in favour of making it optional, claiming that England should not take the Finnish case as "the Truth", but that all reforms, even if inspired by "high-performing" cases, should adapt to the national situation. And a compulsory master programme would definitely mean an over burden on British teachers' workload.

41. In Germany, the PISA 2006 findings have provided unions with valuable data for advocating against early tracking in school and in favour of a more socially equitable school system. Bringing this issue to the public debate has led to the development of a sort of bottom-up movement against early tracking, as now more and more stakeholders (*Hauptschule* school principals, teachers, parents) are becoming increasingly aware of the limits, in terms of social equity, of the current education system based on 3, 4, in some *Länder* even 5, tracks. The government appears to be really afraid of this development, and is adopting parallel measures in the attempt to address the widely recognized inequalities of the system. Yet provisions such as language courses for immigrants, or support mechanisms for parents, and so on, seem to go around the problem, instead of really addressing it by changing the national school system as a whole. However, the government does not appear, so far, to be willing to proceed to such a reform, even in spite of a growing public awareness on and sensitivity to the issue. On its side, the opposition is proposing a two-track system whereby one track would be for high-performing pupils and the other for more problematic children. The forthcoming results of PISA for each German *Länder* will give new evidence to this debate, in a context where education is perceived as a highly competitive race among *Länder* (nowadays the richest ones are able to attract the best teachers as they pay them more) and its reform represents a highly political issue.

42. In Finland, the excellent results have supported union's defense of public education, and OAJ has managed to focus more public attention to teachers and the issue of teacher education. The first conclusions of policymakers were that Finnish schools are of good quality and that the education system functions well; there was no difference between government's and opposition's reactions. It is too early to notice changes or reforms after PISA 2006 results. There have been discussions going on about the existence of a negative link between pupils'

well-being and achievements – but, as there is no evidence-based knowledge about them, OAJ considers that these issues are not connected. Maintaining good results is, of course, very important for the government, so national development projects for basic education have been implemented. The current government values basic education more than the previous one and wants to develop it further; however, the related measures cannot be linked to PISA 2006 as they had started earlier. In any case, the Finnish case presents several key features associated with good quality of education, which could be potentially beneficial to other school systems<sup>11</sup>. The high level of teacher qualification ensures the good quality of the teaching personnel – teachers in Finland are recruited among the top range of graduates and they usually hold a Master’s degree. They also enjoy a high status within society. Moreover, the Finnish system grants students equal access to education and a homogeneous quality level among schools – in fact, PISA 2006 shows that, in Finland, more than half of students are in the top three proficiency levels<sup>12</sup>. This is an extremely important data, because it relates to both quality and equity of the education system. In other words, the Finnish case demonstrates that equity and quality are compatible.

43. In South Korea, PISA offered a quantitative basis to unions to advocate improvements in schools. For example, the low achievements in science represented a chance to pressure the government to reinforce science education. The whole education system was put under scrutiny as a result of the poor results from PISA 2006, as these results gave unions valuable data to ask for reforms aiming to enhance the quality of the Korean school system.

44. These examples show that, thanks to the amount of data and to the significance of the findings PISA presents, it can be a powerful tool in the hands of unions for them to advocate their cause. It is interesting to note that the OECD itself has used PISA data to advocate the cause of equality. The Economic Department Working Paper No.633<sup>13</sup>, released in August, refers to PISA results when putting forward positive recommendations<sup>14</sup> in favour of improving equity in the UK education system. PISA can provide unions with useful evidence to defend their arguments. Alternatively, being part of decision-making and social dialogue, PISA can help unions to give a more balanced and fairer direction to education reforms.

#### Framing the confrontation between government and opposition

45. Policymakers pay a lot of attention to rankings. This means that, if these prove unsatisfactory, the government links them to the bad quality of the country’s education system, hence advocating reforms. If results are positive, governments tend to credit themselves for good performance in international comparative surveys. In any case, very often they blame opposition and/or unions as teacher representatives for failure. The reaction of opposition parties, too, can be either neutral or negative on both sides – towards governments and towards the teaching personnel, as represented by unions. Respondents find that very often (in almost 2/3 of the cases), when PISA 2006 has shown bad results, these have been used by the opposition to criticize the government for its educational policy, focusing on the lack of

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<sup>11</sup> See also paragraph 67 for an analysis of the media reported on the Finish case

<sup>12</sup> See OECD PISA 2006

<sup>13</sup> OECD Education Department, *Raising education achievement and breaking the cycle of inequality in the United Kingdom* August 2008

<sup>14</sup> The main recommendations contained in this Working Paper are summarized in Annex II

investment in education. In any case, unions may find themselves as the target for political discourse: at best they are not mentioned, at worst they are presented as obstacles to reforms.

46. Some examples can clarify how PISA has, in many cases, framed the confrontation between government and opposition. In some cases, unions have found themselves in the middle of this political debate, whether they have been or not involved by politicians in the preparation of education reforms.

47. In Australia, the AEU is represented on the PISA National Advisory Committee, and is accordingly in a position to contribute to Australian government input into the PISA Governing Board. The AEU has not specifically contacted education policymakers about the 2006 PISA data, although it AEU commented on the PISA data upon their release last year and has quoted them in submissions to government departments and other documents. The response of policy makers to the 2006 PISA data is typified by that of the Federal Education Minister and Deputy Prime Minister Julia Gillard. She argued that the relatively small fall in the achievement of Australian students in literacy and numeracy from previous years are attributable to variations in school and teacher quality that should be addressed by performance and testing regimes similar to those in the US and UK. She also used Australia's relatively poor performance in equity to make similar arguments. Although details vary, most other state and territory policymakers have taken similar approaches. The conservative opposition has quoted the PISA data at times for use in its own agenda, although fundamentally its interpretation has not varied greatly from that of the government and it is arguing for similar educational changes. The conservative position on education adopted by the Labor Government since it came into government last November has varied so little from that of its conservative predecessor that it has made it difficult for the opposition to put much water between them.

48. In the Netherlands, in 2007 the Parliament launched a report about the 1996-2006 educational reforms; this report strongly put into perspective the relative high scores in the Netherlands. It stated that the ministers had used the PISA rankings to justify the reforms. The declining results of the country represented a chance, for the opposition parties, to demonstrate the decreasing level of the Dutch education system.

49. In Austria, in the context of PISA 2006, the Minister of Education supported GÖD-Lehrer in informing teachers about the importance of the outcomes of the PISA test. The union warned that it would not be useful, for a positive debate about the outcomes on a professional basis, if fragments of the test results would be given in advance to the media, especially in a (yet another) context where, unfortunately, the information policy of the media (pro-government as well as pro-opposition) was also "sensation-seeking". However, even in this case the union found itself in the middle of the games between the media, the government and the opposition.

50. In Norway, UEN has been contacted by the national authorities on the question of building a common understanding of what can be improved, and especially in relation to the needs of the teachers to do a good job. Policymakers were prepared for the results, and they did not support the image of an education system being on the brink of disaster. Their main focus has been on improving the quality of education, the need for qualified and updated teachers and continuity according to the national reform that is actually being implemented. The political

opposition (rightist) was also prepared for the results: they were somewhat more concerned for the competitive aspects of PISA than the government.

51. In Ireland, as the country performed reasonably well in PISA 2006, discussions focused on highlighting and acknowledging achievements and the overall good outcomes. There was a particular concern that major improvements in the three domains of reading, math and science had not significantly improved in the recent past. Gender differences were also of interest especially in relation to boy's performance in reading. Other weaknesses and areas for concern/improvements were also considered carefully, e.g. the need to enhance parental involvement; students experience of bullying and how this may be affecting performance; the need to maintain and improve performance in math, reading and science; the need to continue to improve the design of curricula and how they are delivered; the value of the "transition year" (a study year between the junior cycle 12-14 years and senior cycle 15-17 years); the importance of student engagement in extra curricular, field and outreach activities; access and use of libraries and access to IT in the home and how it affects learning. In general, the motto was "we are doing well, but we can still do better in terms of students' achievement levels". In fact, the challenge for national economic competitiveness is ever-present in public discourse on education and, therefore, the comparative picture provided by PISA is of great interest to all across the political spectrum. Naturally, the opposition called for more resources to be allocated to schools to help raise achievement levels, while the government countered that schools were already doing well and therefore investment levels were reasonably adequate.

52. In France and Italy, unions have made use of mediocre results of their countries in PISA as an argument in their struggle with their governments for better working conditions, more resources and higher quality of their education systems. In this sense, they have been on the side of the opposition in its struggle against the government's positions on education. There is a correlation in reactions to PISA between opposition political parties and unions, to confute Sarkozy's and Berlusconi's education reforms.

53. In well-performing countries, too, PISA has been anyway at the core of the education debate. In the few countries which have benefited from good publicity, such as Finland, South Korea, Singapore, teachers, even if praised for their success, alongside the leadership of education policymaking, have hardly benefited from this in terms of more investment, pedagogical freedom, and/or training. Moreover, they are increasingly finding themselves as hostages of their own success. Any drop in the comparative rank of the next round of PISA will, presumably, be presented as a major failure, with inevitable consequences for teacher unions.

#### The media as proactive agents for reforms

54. In the EI Guide to PISA (2007) we have already shown that media play a very important role in modern societies as a link between the public and the political level. Media have some democratic responsibility as sort of "gate keepers" of what goes from the public sphere to the political level and vice versa. At the same time, media (especially the editors) have a very distinct power to decide on which stories and messages to bring, the perspectives to be used, or the choice of images. Moreover, media are not independent: their ownership can have political or ideological affiliations. Media representations, therefore, play an extremely significant role

in policymaking: as such, they can shape and express public opinion and influence policymakers' perception of the public will.

55. When the media repeatedly report the PISA results in terms of rankings and ratings, as it happened for PISA 2003, they provide the public with a certain way of thinking about education. When education is restrained to mostly being an issue about how high we rank and quality of education and student performance therefore can be measured in quantitative terms, it automatically narrows the solution to educational problems to a matter of simply ranking higher. This has proven to be one of unions' main concerns regarding PISA. After the 2003 cycle, in fact, the majority of unions reported that they actually found the information provided in PISA as very useful and valuable, but that the media and politicians' narrow focus on rankings gave a simplified and incorrect presentation of very complex issues.

56. This is confirmed by our research on PISA 2006 as well. The great majority of respondents (27 out of 32), when asked which perspective the media adopted to talk about PISA, report that media focused mainly on rankings, sometimes blaming teachers for bad results. Those unions who have been contacted by media when reporting about PISA (20 organizations out of 32) say they have been contacted mainly to "comment on bad performance". Interestingly, only a few report they have been contacted to provide consistent clarifications about PISA. However, 16 unions declare they have spontaneously got in touch with media in order to provide a more structured approach to PISA, involving an explanation of the data, and to bring a focus on national reports for a better understanding of educational issues specific to the country.

57. The analysis of *Meltwater News* reveals that, out of about 12,000 articles published at worldwide level between December 2007 and October 2008:

- around 40% make a simple reference to PISA 2006, without further explanation
- around 29% quote PISA 2006 rankings, again with no further explanation
- around 27-28% use PISA as a reference to advocate for reforms (it is the case, particularly, in Mexico)
- around 1-2% blame teachers for the results
- around 2-3% give technical explanations on PISA rankings.

58. One third of articles just report on pure rankings (especially when they are bad, Finland being the only exception), while only 2-3% articles give some technical explanations on them. Moreover, it is important to highlight that 27-28% of articles advocate for reforms, data that should be combined with the very small 2-3% of articles giving actual explanations on PISA: in other words, almost 30% of the articles make a reference to PISA results in order to advocate for reforms without even analyzing what these results mean – and this is confirmed by both the *Meltwater News* analysis and unions' responses.

59. It is equally relevant to emphasize the existence of articles (around 220) more or less explicitly blaming teachers, in particular, and, more in general, the education system as a

whole, for the poor results in PISA 2006. These articles were found almost everywhere, but largely in the Mexican, Italian, Spanish, Japanese press<sup>15</sup>.

60. Given this context, it is not surprising that unions express mixed feelings when asked what they think about the way the media reported on PISA 2006. 30 organizations say they are only partially satisfied, or not satisfied at all, and only 2 respond that they are fully satisfied. If it is true that the news about PISA has the positive result of bringing educational issues on the public debate, yet the media focuses excessively on rankings, with no deeper explanation nor clarification of them, allowing for different interpretations of results by the various stakeholders – right- or left-oriented media, politicians, unions.

61. This focus of the media on pure rankings is, also, one of the factors explaining why unions gradually changed their attitude towards PISA. Unions have been very positive and interested in PISA when it started. This positive response, however, turned towards caution, disappointment and criticism after the first three rounds of PISA, as unions faced media reactions and policy implications.

62. The great majority of unions heard about PISA before the first cycle, i.e. in 1999/2000. 18 organizations out of 32 reply that they were positive when they first heard about the survey; only 6 organizations report a negative reaction, and 5 organizations say they were “cautious”. In general, organizations say they gradually shifted their positive attitude towards a more careful one, devoting more attention to PISA. If, on the one side, PISA provides a great deal of valuable and interesting data on education, on the other side there is a big risk of these data being used by media and policymakers to influence the debate about education in a particular way. Increasing attention is, therefore, needed. It is interesting to note that those organizations who report a critical and negative stance before the first cycle of PISA have not really changed their attitude after the third one, and say they remain skeptical about it. These developments can also be explained in the light of the fact that the vast majority of unions have not been involved in consultancy for, and preparation of, PISA; the vast majority of them learned about PISA only shortly before it was launched, and some later. They have never really been consulted in the preparation, nor in the analysis, of the study – as was confirmed during our analysis preliminary to the publication of PISA 2006<sup>16</sup>. However, many organizations who have shown a positive attitude towards PISA from the beginning declare this has not changed either, as, in their view, PISA is a source of valuable data and has raised public interest on education.

63. It is interesting to note that one third of respondents report that they perceived a difference in the way the various media reported on PISA: rightist media have often shown a more positive attitude towards the study, if compared to leftist media, advocating for reforms along the lines of the “policy implications” put forward by the OECD.

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<sup>15</sup> Here only some titles from different newspapers around the world: *Testing the teachers – education in Mexico*, *The Economist*, 23 May 08; *POINT OF VIEW – Hiroshi Sasaki: Don't just pour in facts, teach how to learn*, *Asahi.com*, 13 March 08, Japan; *El 50% de los docentes rechaza cobrar plusas por cumplir metas*, *La Opinion de Malaga*, 18 March 08, Spain; *LA ROBIN HOOD TAX E' SOLO MARKETING*, *Wall Street Journal Italia*, 30 June 08, Italy.

<sup>16</sup> “EI Guide to PISA”, 2007

64. For example, in Italy, most of the neo-liberal media have emphasized the necessity of opening the school system to the market, introducing teacher assessment at school level; leftist media, on the other side, have underlined the lack of investment in education, especially in the most deprived areas of the country.

65. In Australia, the PISA data has mostly been ignored by the “conservative” media, as it does not fit their preferred scenario of a “crisis” of educational standards. Australia does not possess a substantial “leftist” media, although the extent of fairness of the use of the PISA data has varied. The conservative Murdoch owned newspaper *The Australian*, for example, has argued that the inequities indicated by the PISA data are associated with “teacher quality”. On the other hand, some programmes of the publicly owned Australian Broadcasting Corporation have used the PISA data to dispel notions of a educational “crisis” that pervade some less responsible media reporting and have focused more on equity issues.

66. Our affiliates in Norway, too, report some differences along the rightist–leftist axes: the rightist media is in favour of more testing and “means-to-a-measurable-end” policy than the leftist media.

67. In the United States, affiliates report a continuing push by certain anti-public education groups on the right and media supporting them, to demonstrate the slippage of US competitiveness and need for more market-based reforms.

68. Within this new emerging trend is rather whole-sale approach to policymaking, the media have also acted as promoters of PISA-oriented reforms to “copy and paste” the characteristics of the school systems of well-performing countries. In this sense, too, it acted as promoters of PISA-oriented reforms. Especially after PISA 2006 was published, in fact, the whole education systems of supposedly successful countries (like Finland) have been increasingly examined with the potential aim to copy education models “that work” – in OECD terms. The analysis of 12,000 articles from *Meltwater News* shows that Finland is cited in almost 75% of the articles, very often as the example other countries have to look at. Among the ingredients for success widely identified by the media, we find aspects related to orthography, geography, history, and the society itself. In Finnish, each letter makes a single logical sound and there are no irregular words, which makes learning to read easy. An economy until recently dependent on peasant farming in harsh latitudes has shaped a stoic national character and an appetite for self-improvement. Centuries of foreign rule (first the Swedes, then the Russians) further entrenched education as the key to national identity. So hard work and good behavior are the norm; teaching attracts the best graduates. The ‘ubiquity of print’ is another factor: each family has and reads a newspaper on a daily basis<sup>17</sup>. But these are not the only factors. Media also cite the low intergenerational income elasticity, i.e. the correlation between people's income and that of their parents. When it is low, as in Finland, it means that parental income has a minor influence on earning; in other words, Finns switch economic classes easily. Hence, “Finns trust teachers and schools [...] What Finnish schools do is genuinely effective”<sup>18</sup>. Keeping the status of teachers high, in terms of both salaries and qualifications, plays a key role, too. Involving teachers in the decision-making process in school, i.e. how decisions in education are made,

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<sup>17</sup> *Education reform: Top of the class – Learning lessons from abroad, The Economist*, 26 June 2008

<sup>18</sup> *Education in Sweden and Finland: Our friends in the North, The Economist*, 6 June 2008

represents another fundamental ingredient explaining the Finnish success. Last but not least, many articles refer to the relevance of an early energetic intervention in support of struggling pupils: in Finland, large numbers of pupils, including many with behavioral difficulties, are taught separately.

69. None of these articles referred however to the successful campaign undertaken by the OAJ two decades ago to improve the status of teachers in Finland. The prolonged teachers' strike of that time was strongly supported by public opinion, and teachers' status was improved substantially. Here is strong evidence for the argument that "Teachers Matter", but the media have not taken it up, preferring instead to look for the explanation for Finland's success in national history and traditions.

70. A few reflections to recap. First, the media, in general, did definitely contribute to a simplistic interpretation of PISA results. The means of communication almost everywhere have proven mostly concerned only with rankings of their country among other participating countries, regardless of all other valuable information. This limited and narrow focus has sometimes led to the blaming of teachers for poor results, which, in turn, has made unions more defensive. As almost any position below the few first in the rank table is likely to be framed in public debate as a "failure", and as an increasing number of countries participate in PISA, so more and more of them are emerging as "failed" education systems, or "not competitive enough ". As a result, the public image of PISA becomes associated with bad publicity for education, which is very unfortunate. Second, conservatively or business oriented press has widely used the results for advocating in favour of the policy recommendations developed through particular interpretation of PISA 2006: teacher assessment at school level, more testing, parent choice and other "quasi" market-oriented school reforms. Therefore, such media have acted, in this sense, as promoter of reforms based on the OECD efficiency-led criteria. Third, media have often advocated the implantation of those features that characterize high-performing school systems into low-performing education systems, regardless of the various contextual factors.



## CONCLUSIONS

71. PISA is increasingly significant for education policy development. However, as proven by EI's analysis of the previous PISA cycles, it is just the tip of the iceberg of a bigger process: the trend towards evidence-based policymaking as a force in politics on international scale. Research, in general, and international comparative surveys, in particular, are becoming part of advocacy and policymaking, as well as a key element of the basic "arsenal" in political struggle.

72. Unions are not opposed to international comparative research *per se*; most of them do have a positive and constructive approach towards it and recognize that PISA, in particular, has been beneficial in raising public attention on education. However, an excessive focus on PISA results as mere rankings by both the media and national governments has made unions more cautious. Results are generally taken as they are, with no further inquiry or explanation, then used as a grounding reason for worrying (or, rarely, enthusiastic) declarations on the status of national education systems and, in turn, to advocate reforms intended to improve the country's performance and to increase the "quality" of its school systems.

73. If PISA results are not explained nor analyzed in details, they can be interpreted in many different ways. Taken as they are, which is, as shown, very often what happens, PISA results can be used to support A as well as the opposite of A. Hence, both unions and governments can employ PISA as a useful instrument, in whichever direction.

74. This means that he who holds the greater political power succeeds in using PISA as a justification for his own policies. In a context where "soft power" instruments are increasingly influential in shaping the public opinion, through the media, and in guiding policy orientations, through the governments, an organisation holding great "soft" political power – as the OECD – is likely to have, with its findings and, hence, recommendations, a huge impact on the education policy debate. The data the organization makes available, and the policy implications drawn from it, in fact, represent an extremely powerful weapon in the hands of those stakeholders who intend to implement reforms which are in line with these policy guidelines. Very often, these stakeholders are governments. And, when PISA is brought as an undisputable point of reference by governments to justify reforms, it is very difficult for unions to confute it and counter-react to these reforms, unless they manage to interpret PISA results in the opposite way, as we have seen. However, since unions do not have the same political power as governments, their analysis and interpretation must be extremely convincing in order to weigh sufficiently in the debate. Furthermore, very often unions have been caught in the middle of political games between governments and opposition parties, eventually losing their bargaining power even when they have tried to use PISA in their favour. Nonetheless, if we approach the political process not with a controversial but, rather, with a constructive and cooperative perspective, the interpretation of PISA can represent a valuable ground for finding arguments towards a consensual approach to reforms. This requires a well-established and balanced climate for social dialogue and partnership, which is the case in many, but not in all countries. In other words, when thinking about conclusions and recommendations, we have to keep in mind that "no one size fits all". In their choice of strategy on how to use PISA evidence, hence, unions have to adjust it to the actual political situation of their country.

75. As a result of the trends towards the quantification of measurements in education, the biggest danger is not the international comparison *per se*, which is inevitable and actually useful at global level, but the vicious circle of international comparisons only on the basis of an economic blueprint led by “efficiency” and “competitiveness” motivations. This is, if not exactly the logic behind PISA, what PISA seriously endorses. In this sense, PISA has been used effectively in guiding, through its policy recommendations, national governments’ policy directions in education towards an economic approach. As is shown by analysis of both initiatives put in place by different governments and the role of media in promoting these measures, there seems to be a convergence between numerous “pro-market” agents at national and international levels and the OECD towards efficiency-, competitiveness- and market-oriented reforms of national school systems.

76. This aspect is particularly relevant – and dangerous – in the light of the current financial situation at the global level. Governments are keen on implementing policies that call for cutting budgets and limiting public funding of social services, namely education, maintaining at the same time their quality. That is why an approach aiming at increasing the efficiency (better results with less investment, or same output with less input) of public services – and education, in particular – appears, nowadays, to represent an answer to this *impasse*.

77. The challenge now is to prove that PISA can be a means for redirecting the education policy debate towards quality and equity, achieved through publicly funded policies aiming at improving teaching and learning conditions.

78. As unions, then, we have to refocus the attention of the education world towards quality and equity. As we have seen above, the Finnish case shows that these educational outcomes are not only compatible, but they represent two sides of one “success story”. We must, therefore, try to reshape public discourse – with or without reference to PISA – towards quality and equity of education, expressed not only, as it is nowadays the case, in economic terms – effectiveness, efficiency and rates-of-return, “human capital stock” – but, instead, in terms of human rights and sound public services, which can be “effective” as well, but which, above all, represent an overarching goal and value *per se*. In order to remain important in policymaking, unions have to adapt to this new reality of public discourse and to its impact on policies. If we want to influence PISA by making it a policy instrument, we have to develop our own analysis and interpretation of it.

79. First of all, PISA should include, together with a principals’ questionnaire, one for teachers in order to include them directly (now, teachers are only included into the OECD Teacher Survey, TALIS, which is separate and independent from PISA). Moreover, teachers can, through their representatives, work more proactively within PISA (and other surveys), trying to direct it towards a more qualitative evaluation. Furthermore, unions could advocate a more comprehensive approach towards school subjects within PISA. The next cycles could, in fact, go beyond mathematics, science and reading, to include other subjects that are equally measurable and comparable at global level: geography, for example, or knowledge of national language or of national history. In other words, there is room for further content development which would definitely convey a more complete picture of education level worldwide, at least in terms of subject matters. Teacher unions can also work on a parallel track – developing their own indicators systems about quality of education from the perspective of education as a human

right, rather than as a human capital. Both pathways can be simultaneously beneficial. But international cooperation between unions is crucial towards the achievement of this goal. Staying out of the actual international developments of comparative research and education indicators does not seem to be an option – there is no “opt-out” in PISA, as peer pressure and the public opinion exert a very strong pressure on governments. As unions, we should look at this development as an opportunity both for acquiring innovative methods of work and for the quality of education *per se*.

80. Education International can play an important role of coordination and synthesis between unions at international level. What emerges clearly from the responses, in fact, is a strong request for an EI policy development on this, especially in terms of alternative models for research and for developing unions’ own research project for the evaluation of education quality. The majority of respondents report they would like to increase the research activity on education, in a way to propose alternatives to the OECD efficiency-led blueprint for comparative surveys. Unions, in particular, refer to the need of putting forward best practices and alternative models – based on quality – to challenge PISA. This could be further developed through, first of all, more and more comparative international research, and, second, international seminars for discussion and exchange. Finally, it could represent the subject of a break-out session at EI’s next Congress, as many organizations suggest.

## ANNEX I

### *H.R. 2272: America COMPETES Act*

#### *Title VI - Education*

##### Subtitle A - Teacher Assistance

###### Part I - Teachers for a Competitive Tomorrow

Section 6113 - Authorizes the Secretary of Education (Secretary, for purposes of this Title) to award competitive matching grants to enable educational partnerships to develop and implement programmes to provide courses of study in science, technology, engineering, mathematics, or critical foreign languages that: (1) are integrated with teacher education; and (2) lead to a baccalaureate degree with concurrent teacher certification.

Section 6114 - Authorizes the Secretary to award competitive matching grants to educational partnerships to develop and implement: (1) two- or three-year part-time master's degree programmes in science, technology, engineering, mathematics, or critical foreign language education for teachers in order to enhance the teachers' content knowledge and teaching skills; or (2) programmes for professionals in science, technology, engineering, mathematics, or a critical foreign language that lead to a one-year master's degree in teaching that results in teacher certification.

Section 6115 - Directs the Secretary to award each of the above grants for up to five years. Requires 50% nonfederal matching funds.

Section 6116 - Authorizes appropriations.

###### Part II - Advanced Placement and International Baccalaureate Programmes

Section 6123 - Authorizes the Secretary to award competitive matching grants for up to five-year periods to enable educational agencies or partnerships to carry out activities designed to increase the number of: (1) qualified teachers serving high-need (low-income or rural area) schools who are teaching advanced placement or international baccalaureate courses in mathematics, science, or critical foreign languages; and (2) students attending such schools who enroll in and pass the examinations for such courses.

Requires 200% nonfederal matching funds, but requires no more than 100% from high-need local educational agencies (LEAs). Permits the Secretary to waive the match for educational agencies if it would cause them serious hardship or prevent them from carrying out the programme.

###### Part III - Promising Practices in Science, Technology, Engineering, and Mathematics Teaching

Section 6131 - Requires the Secretary to contract with the National Academy of Sciences (NAS) to convene an expert panel to identify promising practices for, and synthesize the scientific evidence pertaining to, improving the teaching and learning of science, technology, engineering, and mathematics in kindergarten through grade 12. Requires the dissemination of the panel's findings and recommendations to the public and state and local educational agencies. Authorizes appropriations.

##### Subtitle B - Mathematics

Section 6201 - Authorizes the Secretary to award competitive three-year matching grants to states and, through them, subgrants to high-need LEAs to: (1) implement mathematics programmes or initiatives that are research-based; (2) provide professional development and instructional leadership activities for teachers and administrators on the implementation of mathematics initiatives; and (3) conduct student mathematics progress monitoring and identify

areas in which students need help in learning mathematics. Applies the programme to students and teachers in kindergarten through grade 9. Requires state grantees to contribute 50% of programme costs. Authorizes appropriations.

Section 6202 - Directs the Secretary to carry out a demonstration programme under which the Secretary awards up to five grants each fiscal year to states for the provision of summer learning grants to disadvantaged students. Requires the summer programmes to emphasize mathematics, technology, engineering, and problem-solving through experiential learning opportunities. Limits to 50% the federal share of such grants. Authorizes appropriations.

Section 6203 - Requires the Secretary to establish a programme that provides competitive three-year matching grants to states and, through them, subgrants to eligible LEAs to establish new services and activities to improve the overall mathematics performance of secondary school students. Provides: (1) a minimum grant amount of \$500,000; and (2) a state matching funds requirement of 50% of programme costs. Authorizes appropriations.

Section 6204 - Directs the Secretary to establish peer review panels to review state applications for the mathematics grant programmes, excluding the demonstration grant programme.

#### Subtitle C - Foreign Language Partnership Programme

Section 6303 - Authorizes the Secretary to award grants to enable partnerships of institutions of higher education and LEAs to establish programmes of study in critical foreign languages that will enable students to advance successfully from elementary school through postsecondary education and achieve higher levels of proficiency in such languages. Makes such grants for five-year periods, authorizing the Secretary to renew them for up to two additional five-year periods. Outlines matching funds requirements.

Section 6304 - Authorizes appropriations.

#### Subtitle D - Alignment of Education Programmes

Section 6401 - Authorizes the Secretary to award competitive grants to enable states to work with statewide partnerships to: (1) promote better alignment of content knowledge requirements of secondary school graduation with the knowledge and skills needed to succeed in postsecondary education, the 21st century workforce, or the Armed Forces; or (2) establish or improve statewide P-16 (preschool through baccalaureate degree) education data systems. Requires each state to match grant fund amounts. Authorizes appropriations.

#### Subtitle E - Mathematics and Science Partnership Bonus Grants

Section 6501 - Directs the Secretary to award grants, during school years 2007-2008 through 2010-2011, to each of the three elementary and three secondary schools with a high concentration of low-income students in each state whose students demonstrate the most improvement in mathematics and science, respectively.

Section 6502 - Authorizes appropriations.

## ANNEX II

OECD Economic Department Working Paper No.633, *Raising education achievement and breaking the cycle of inequality in the United Kingdom*, August 2008 – key recommendations:

- Increase regular participation in quality early childhood education, and continue to target childcare service provided by Sure Start Children’s Centres to disadvantaged families. Sustained intervention once disadvantaged children have entered primary school will also be required, to ensure that the benefits of pre-school interventions are sustained.
- Continue to promote a focus on the acquisition of core literacy and numeracy skills for pupils at primary and secondary school.
- Ensure that the focus on core skills is not compromised by the goal of expanding the average number of years of schooling. Emphasise the role of core literacy and numeracy skills within the new Diplomas. Consider introducing a higher age for compulsory participation only for those students who have not already achieved a certain minimum standard of core skills by age 16.
- Evaluate returns to the new diplomas closely. When A-levels are reviewed vis-à-vis the new Diplomas in 2013, give serious consideration to moving towards a more unified framework of qualifications as originally recommended by the Tomlinson report.
- Ensure continued participation in international tests of cognitive ability, such as PISA and PIAAC.
- Reduce the focus on testing and targets and put more focus on supporting weak students and schools.
- Design all remaining targets in a way that limits the potential for gaming, by ensuring an interactive performance management system that captures the complexity of the education process. Ensure that remaining key performance measures are not based on targeted outputs.
- Encourage a public debate about whether the goal of the education system should be to make all schools high performers, and what societal values that would reflect.
- Consider ways of encouraging the highest quality teachers to move to the most disadvantaged schools – such as by giving bonuses for high quality teaching performance at such schools.
- Promote a national benchmark formula for local authorities to use in allocating funding between schools, while still permitting flexibility (i.e. deviation from the benchmark formula) to meet local needs.
- Promote the transition to a more efficient allocation of funds by providing standard procedures for taking deprivation-targeted funding out of the formula used to determine the Minimum Funding Guarantee. Permit smoothed transitions to the improved formulas in cases where significant school funding volatility for some schools would result. However, make clear the medium-term goal of equitable funding allocation.
- Evaluate the pros and cons of introducing a differentiated voucher system of funding (as in Chile) where pupils from poorer families receive vouchers that are valued more highly than those for the general population.
- Encourage more research into determining which resource mixes within schools are most successful at narrowing socioeconomic gaps.

## LIST OF RESPONDENTS

Organization	Country
GL	DENMARK
AOB	NETHERLANDS
ASTI	IRELAND
CTERA	ARGENTINA
SNES	FRANCE
LARARFORBUNDET	SWEDEN
ESEUR	RUSSIA
CTF	CANADA
UNSA	FRANCE
NZEI	NEW ZEALAND
UTU	NORTHERN IRELAND
FLC CGIL	ITALY
NASUWT	UK
JTU	JAPAN
KI	ICELAND
CNTE	BRAZIL
GEW	GERMANY

GOD-LEHRER (3)	AUSTRIA
OAJ	FINLAND
BLBS	GERMANY
FUURT	FINLAND
TUI	IRELAND
SER	SWITZERLAND
LCH	SWITZERLAND
AEU	AUSTRALIA
UEN	NORWAY
NUT	UK
NEA	US
VBE	GERMANY
FNE	PORTUGAL
KFTA	SOUTH KOREA
FETE-UGT	SPAIN