

**Happiness as a Floating Signifier:
Happiness education and 'happy human capital' in the OECD
and South Korea**

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Thesis submitted to UCL Institute of Education

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Doctor of Philosophy, PhD

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Declaration

I, Min Ji Kim, confirm that the work presented in this thesis is my own. Where information has been derived from other sources, I confirm that this has been indicated in the thesis.

See pages 6 and 7 for details of an inclusion of author's own published work in this thesis.

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Abstract

Along with other humanistic notions, such as global citizenship and lifelong learning, the concept of happiness has been attractive to education stakeholders as a generic antidote to the social problems of increasing alienation and youth suicide rates. South Korea is an interesting case in this regard because, while the country has consistently ranked as one of the top-performing countries in the OECD Programme for International Student Assessment's (PISA) subject areas, its success came at the cost of student happiness. Its poor performance on the PISA's measurement of happiness and life satisfaction generated an educational 'crisis' narrative, granting the government the legitimacy to introduce a 'Happiness Education Policy' (HEP) in 2013.

The purpose of this thesis is threefold: firstly, to explore how OECD, as an influential global education policy actor, has driven the happiness discourse in education policy and what its approaches were; secondly, to investigate the emergence and manifestation of happiness discourses in Korea's education reform; and thirdly to understand how the notions of happiness and 'Happiness Education' are understood and practised by school-level actors in their day-to-day school lives.

Through a documentary analysis of OECD publications and key policy documents of the two governments of Korea, semi-structured interviews with policy intermediaries and school-level actors, and an online questionnaire with school-level actors, this thesis identifies that the concept of happiness turned into a 'floating signifier'. It reveals that the concept is constantly resignified per the political and economic interests of the institution(s) or per school-level actors' belief in their daily roles and aspirations in promoting student happiness and well-being. The thesis finally argues that the concept of happiness may suffer the same fate of being dictated by a narrow functionalistic focus on competence and skills as already experienced by other humanistic initiatives, such as lifelong learning and global citizenship education.

Impact Statement

Numerous studies have focused on the global and national policy actors' greater propensity to reference foreign examples or to employ 'governance by numbers' to initiate and legitimise new educational movements and reforms. Central to these soft mechanisms has been the recognition of the international organisations' technocratic expertise and their role as knowledge producers, as well as the problematic assumption of the 'diminished' role of the state in what is believed as a time-space compressed world.

In that regard, this thesis constitutes a contribution to both academia as well as education policy and practice in several ways. First, it raises that it is not just the numbers that give global education policy actors (e.g., the OECD) and national politicians and policymakers the legitimacy to push forward particular agendas into and across the boundaries of nation-states but also the ways in which an agenda gets framed and then goes unchallenged. My review of four East Asian societies and an in-depth analysis of the 'Happiness Education Policy' in South Korea also offer critical insights into the importance of studying policy development over time to reveal how humanistic 'floating' policy signifiers, such as 'happiness', are embedded and get (re)signified as per the changing political and economic agenda.

Some of the ideas and findings developed in this thesis have already contributed to academia through publications in scholarly journals and presentations at academic conferences and doctoral seminars. Two chapters (**Chapters 3 & 6**) have also been developed into a lecture at the UCL Institute of Education, which I have been teaching over the past year. The 'impact' of this lecture can already be seen in the students' module feedback, where my session was identified as the one that was most interesting and made them reflect on their ways of 'reading' the official policy narratives.

Regarding this thesis's impact outside the academia, as a recipient of the IOE Early Career Impact Fellowship award, I am planning to develop school-level actors' first-person narratives on their perception of student happiness (**Chapter 7**) into digital resources that could (i) expand the public understanding of the disjuncture between macro-level policy rhetoric on student happiness and the micro-level practices at schools, and (ii) introduce a list of potential school-level interventions and individual practices that would overcome the 'bounded' imaginaries of student happiness. Thus, my thesis will have an impact on education

practice by providing useful materials for teacher educators to adapt and use and for school-level actors to reflect on and improve their practice, which, in the long term, will create a positive learning experience for students.

Preface

The findings from this thesis have been published, accepted for publication, or are under review, in peer-reviewed journals:

Kim, M. J. (2022). Happiness, politics and education reform in South Korea: Building ‘happy human capital’ for the future. *Comparative Education*, 1-17. Advance online publication. <https://doi.org/10.1080/03050068.2022.2147633>

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This research experience was not an individual journey and would not have been possible without the unwavering support from my supervisors, Professor Paul Morris and Professor Terri Kim. Paul and Terri made sure that my journey was full of inspiration, fun, and excitement. Paul, I am grateful for your thought-stimulating comments and your unique ability to just ‘know’ what to do with my unprocessed thoughts. Terri, your breadth and depth of knowledge never cease to amaze me; your intimate knowledge of the history of the South Korean education system and rigorous scrutiny of my thesis were invaluable. My deepest thanks to you both – not only for your immense knowledge and guidance but also for your warm encouragement and faith in me.

My heartfelt gratitude to Professor Robert ‘Bob’ Cowen, whom I see as my mentor. Bob was there from the very beginning of this research journey, keeping me busy with a good mixture of ‘carrot and stick’ to push me upward and forward. Regrettably, he was unable to witness the completion of this work, which deeply disheartens me. Every conversation I had with him was a valuable learning experience, and, of course, his well-known acid wit and banter were a bonus.

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Lastly, to my grandfather whose eyes speak a thousand words, you are the one who kept me going. I hope I made you proud.

Dedication

I wanted to congratulate you. You have reached another level of work and have clearly escaped becoming yet another a well-trained researcher who will produce some 'Results' of no intellectual interest to anyone.

When the world returns to normal, use tae kwon do on anyone who asked you about 'method' or field-work techniques.

Your idea should lead to something important and publishable.

Well done.

Warm wishes,

Bob

It is no exaggeration to say that the day I received this message from the late Professor Robert 'Bob' Cowen was the happiest day of my doctoral life. With utmost respect and admiration, I dedicate this thesis to you, Bob.

May your kind soul find eternal peace.

Table of Contents

Abstract	3
Impact Statement	4
Preface	6
UCL Research Paper Declaration Form	7
Acknowledgements	8
Dedication	10
Table of Contents	11
List of Tables and Figures	14
List of Appendices	15
List of Acronyms	16
Chapter 1 Introduction	17
1.1 Introduction	17
1.2 Happiness Education	21
1.3 Motivation and Rationale	24
1.4 Research questions	26
1.5 Paradigms and Perspectives	30
1.6 Significance	34
1.7 Thesis structure	36
Chapter 2 Literature Review: From Individual Pleasure to Communal Harmony to Happy Workers	39
2.1 Introduction	39
2.2 (Diss)association of meanings: Using signifiers in policy language	40
2.2.1 The origin of the term signifier	40
2.2.2 Signifiers in policy language	42
2.3 Different conceptions of happiness	45
2.3.1 Philosophical and psychological understandings of happiness	45
2.3.2 The rise of 'happiness science'	53
2.3.3 Happiness as a policy signifier	56
2.4 The 'global turn' of education	60
2.4.1 The role of International Organisation (IO) in global governance	60
2.4.2 IOs as education policy actors	63

2.5	National and local responses to 'travelling' policies	65
2.6	Conclusion	68
Chapter 3 The rise of 'Happiness Education' in East Asia		69
3.1	Introduction.....	69
3.2	East Asian countries: Analogous but not homologous	70
3.2.1	Japan: From <i>yutori</i> to the promotion of 'ideal citizens'.....	70
3.2.2	Singapore: From holistic development to Social and Emotional Competencies.....	74
3.2.3	China: Happiness Education through 'unburdening'.....	82
3.2.4	Hong Kong: Holistic development through Learning to Learn.....	85
3.3	Discussion and Conclusion.....	88
Chapter 4 Methodology		90
4.1	Introduction.....	90
4.2	Epistemological and ontological approach.....	90
4.3	Data collection methods	93
4.4	Data analysis	105
4.5	Methodological limitations and challenges	110
4.6	Ethical considerations	112
4.7	Conclusion	113
Chapter 5 The OECD's Conceptions of Happiness and Well-being: From learning dispositions to skills for the future economy		114
5.1	Introduction.....	114
5.2	Historical overview of the OECD and its educational activities	115
5.2.1	Historical transition from the OEEC to OECD	116
5.2.2	OECD's early approaches to education: 1960-80s.....	117
5.2.3	OECD's educational approach to knowledge economy and neoliberal globalisation: 1990s-2010s	121
5.3	OECD's new education gesture: A 'humanitarian turn'	122
5.4	'Happiness' and 'well-being' from learning dispositions to skills for the future.....	126
5.4.1	PISA 2012: Happiness as a learning disposition	127
5.4.2	PISA 2015: Laying the groundwork to build technical expertise.....	133

5.4.3 Post-2015: 'Skillifying' happiness and well-being to prepare for the 'imagined crisis'	137
5.5 Conclusion	144
Chapter 6 Happiness Education in South Korea: Building 'happy human capital'	146
6.1 Introduction.....	146
6.2 Brief overview of party politics in Korea	147
6.3 The rise of 'happiness' discourses in the early 2010s.....	149
6.4 The introduction of Happiness Education Policies (HEP).....	156
6.5 Happiness and 'Innovative Talents': The left-wing DPK government	164
6.6 Discussion and Conclusion: From 'Learning for Happiness' to 'Happy Human Capital'	170
Chapter 7 School-level actors' understanding of happiness and their role in promoting student happiness.....	175
7.1 Introduction.....	175
7.2 'Belief'	180
7.2.1 A quantitative overview of perceived aim(s) of education.....	180
7.2.2 Different understandings of happiness and well-being.....	186
7.3 Factors of 'disruption'.....	195
7.4 Thinking outside the box: <i>What if?</i>	199
7.5 Conclusion	203
Chapter 8 Conclusion.....	205
8.1 Introduction.....	205
8.2 Chapter summary	205
8.3 Key arguments and contributions to the literature.....	210
8.4 Limitations and avenues for future research.....	220
8.5 Reflections on recent developments and Conclusion	221
References	225
Appendices.....	302

List of Tables and Figures

Tables

Chapter 4

Table 4.1. Data Collection Summary	94
Table 4.2. Interviewee information.....	100
Table 4.3. Reliability of questionnaire measured by Cronbach’s Alpha	109

Chapter 7

Table 7.1. Demographic characteristics of questionnaire respondents.....	176
Table 7.2. Prior training on Happiness Education	178
Table 7.3. Demographic characteristics of interview participants	179
Table 7.4. Top 10 statements according to their aggregate score index (<i>i</i>)	183
Table 7.5. Bottom 10 statements according to their aggregate score index (<i>i</i>)	184
Table 7.6. A high consensus on ‘happiness’ as an aim of education.....	185

Figures

Chapter 3

Figure 3.1. <i>The Straits Times</i> news excerpts in 1997 and 1998.....	76
Figure 3.2. Framework for 21st Century Competencies in the CCE syllabus.....	80

Chapter 4

Figure 4.1. A sample mapping of themes, codes, and quotes.....	107
----------------------------------------------------------------	-----

Chapter 5

Figure 5.1. Percentage of students who report being happy at school.....	129
Figure 5.2. PISA in Focus.....	131
Figure 5.3. Sample questions on subjective well-being in PISA 2015.....	135

Chapter 7

Figure 7.1. The index of accumulated score	181
Figure 7.2. Linking educational aims to different aspects of development.....	182
Figure 7.3. School-level actors’ role in promoting student happiness.....	187
Figure 7.4. Barriers to school-level actors’ role in promoting student happiness... ..	196

List of Appendices

Appendix 1. Full list of documentary data (Chapters 5 & 6)	302
Appendix 2. Online questionnaire: Information sheet and consent form	311
Appendix 3. Online questionnaire (in Korean)	313
Appendix 4. Sample interview schedule (policy intermediary)	331
Appendix 5. Sample interview schedule (school-level actor)	332
Appendix 6. Vignette of translated and transcribed interview	333
Appendix 7. Response frequency and percentage of respondents (n=50) with mode and median	336

List of Acronyms

BLI – Better Life Initiative
CCE – Character and Citizenship Education
CCS – Comparative Case Study
CERI – Centre for Educational Research and Innovation
DPK – Democratic Party of Korea
DUP – Democratic United Party
FSI – Free Semester Initiative
GCE – Global Citizenship Education
GDP – Gross Domestic Product
GNP – Grand National Party
HEP – Happiness Education Policy
HSCS – High School Credit System
ILSA – International Large-scale Assessments
IO – International Organisation
IR – International Relations
KEDI – Korean Educational Development Institute
KICE – Korea Institute for Curriculum and Evaluation
MEXT – Ministry of Education, Culture, Sports, Science and Technology
MOE – Ministry of Education
NAEA – National Assessment of Educational Achievement
NFP – New Frontier Party
OECD – Organisation for Economic Co-operation and Development
OEEC – Organisation for European Economic Co-operation
PIAAC – Programme for the International Assessment of Adult Competencies
PIRLS – Progress in International Reading Literacy Study
PISA – Programme for International Student Assessment
PPP – People Power Party
PSLE – Primary School Leaving Examination
SDG – Sustainable Development Goal
SEL – Social and Emotional Learning
SSES – Survey on Social and Emotional Skills
STI – Sociotechnical Imaginary
SWB – Subjective Well-being
TALIS – Teaching and Learning International Survey
TIMSS – Trends in International Mathematics and Science Study
TLLM – Teach Less, Learn More
TSLN – Thinking Schools, Learning Nation
UN – United Nations
UNESCO – United Nations Educational, Scientific and Cultural Organisation
UNSDSN – United Nations Sustainable Development Solutions Network
4IR – Fourth Industrial Revolution

Chapter 1 Introduction

1.1 Introduction

In the book *Progeny*, first published in 1954, Philip Dick (2013) presents a dystopian society where robots have taken over every aspect of human life, from delivering babies as an obstetrician, child rearing, determining children's capacities and their latent abilities, to educating and training them. Babies are taken away when they are born as parents are deemed as 'not objective', distorted, and emotionally biased to bring up their children in their best interests. Children are hence kept away from any contact with human beings until they reach a certain age as this might inhibit their development, and are only allowed to interact with robots. In this world, showing – or *having* – emotions is considered 'hopelessly warped' and 'neurotic'.

The famous dystopian novel *Brave New World* depicts 'happiness' as the utmost priority of the society, where the stability of the society depends on the state of happiness of the population (Huxley, 1932). Science and technology are used as a means to make citizens happy, and citizens are conditioned to take a recreational drug called 'soma' to avoid any negative emotions, depression, or stress. In other words, the hedonistic and utilitarian happiness promoted by the World State is socially constructed, where individuals are denied the *right* to be unhappy. Similarly, in George Orwell's (1949) novel *1984*, the concept of happiness is portrayed as something that can be obtained only if individuals are willing to sacrifice their individuality and freedom. The Party controls what the individuals can think and speak by, for example, introducing a new language with restricted vocabulary and simplified grammar called *Newspeak* and through surveillance technologies such as the telescreen. In other words, many of these dystopian novels tend to convey a particular vision of happiness, one in which individuals are considered as 'irrational' and unable to make the 'right' choices that would benefit both the present and future society. At the core of delivering such a vision of happiness lies a fundamental belief that the state serves as an 'educational entity,' with the responsibility to foster both happiness and education. As also described in Plato's (1992) book *Republic*:

[1] The young can't distinguish what is allegorical from what isn't, and the opinions they absorb at that age are hard to erase and apt to become unalterable. For these reasons, then, we should probably take the utmost care to insure that the first stories they hear about virtue are the best ones for them to hear ... You and I, Adeimantus, aren't poets, but we are founding a

city. And it's appropriate for the founders to know the patterns on which poets must base their stories and from which they mustn't deviate. (378d-379a)

[2] ...it isn't the law's concern to make any one class in the city outstandingly happy but to contrive to spread happiness throughout the city by bringing the citizens into harmony with each other through persuasion or compulsion and by making them share with each other the benefits that each class can confer on the community. The law produces such people in the city, not in order to allow them to turn in whatever direction they want, but to make use of them to bind the city together. (519e-520a)

In *Republic*, Socrates stresses that the state must bring people into harmony for greater happiness and virtue and that what children hear and learn from the beginning becomes part of whom they become. As such, education is perceived as a means of attaining an ideal just society, which falls under the responsibility of the state.

With the fourth industrial revolution underway, there have been questions about the future role of education, particularly how modern technologies, such as artificial intelligence, robotics, and automation, will reshape an individual's learning experience, and the focus now extends beyond the state to include commercial organisations and global agencies. How the tech economy, such as Google and Microsoft, is driving major changes in public education has raised concerns about losing the essence of public education as a public good. Singer's (2017) *New York Times* article 'How Google Took Over the Classroom', for example, points out not only the potential privacy and security of students' personal data but also how these tech companies are narrowing the purpose of public schools to produce skilled and knowledgeable digital workers. The unexpected outbreak of coronavirus disease also brought new possibilities and imaginations of what the future of education would look like in the post-pandemic era (Morris et al., 2022; Tesar, 2021). The narratives in the recent debate – not just at the global level but also at the national level – have increasingly shifted from the focus on a narrow understanding of the 'learning crisis' that focuses on key academic subjects, literacy, science and numeracy, to a broader definition that encompasses students' general life and well-being, both inside and outside of school (for China's double reduction [*shuang jian*] policy, see Xue & Li, 2022; for Korea's Happiness Education policy, see M. J. Kim, 2022).

Particularly notable in recent years among the publications from International Organisations (IOs) (e.g., the World Bank, UNESCO, and the OECD), global businesses (e.g., Microsoft), and academia has been the emphasis on children's happiness and well-being and the role education can play in promoting them. The OECD, in particular, has attempted over the past

decade to measure students' happiness and well-being through its Programme for International Student Assessment (PISA) surveys, albeit often variously articulated in terms of engagement, well-being, or satisfaction in school and life (see OECD, 2013a). In more recent years, however, the notion of student happiness (and, generally, well-being) has been tied into the IOs' futuristic agendas, particularly into their vision of the knowledge, skills, and capabilities individuals in future should be equipped with. In their agenda, the notion of happiness has increasingly been associated with 'socio-emotional skills', 'creativity', and 'critical thinking' (M. J. Kim, 2022). World Bank (2020, p. 8), for example, portrays social and emotional skills as:

...critical determinants of whether youth can work towards achieving their aspirations in the course of their education, and whether they are likely to find and sustain employment over the longer term.

OECD (2019a) has also been promoting the blending of AI technologies with individual's social and emotional skills, describing the latter as the key to becoming 'first-class humans, not second-class robots' (p. 3). In other words, the necessity and importance of these 'new' and 'soft' skills are justified by the IOs' shared view that they are complementary to both cognitive skills and literacies (Rahm, 2023). The link between education and the economy, therefore, remains firm, if not stronger, through the promotion of dispositions which were previously not considered skills that would drive the economy.

The notion of 'happiness' – and the various meanings attached to it – has been central to both the IOs' and national policy actors' development and legitimation of their visions of the future, especially those involving imaginaries of the future economy and technologies (see M. J. Kim, 2022). In the science and technology studies literature, these visions are called 'sociotechnical imaginaries' (STIs), also defined as 'collectively held, institutionally stabilized, and publicly performed visions of desirable futures' (Jasanoff & Kim, 2015, p. 19). These imaginaries are often reflected in and promoted through global or nationwide scientific and technological development projects. Similarly, these STIs form the basis of constructing the dominant 'social imaginary of a *globally competent student* while perhaps excluding other possibilities' (Gardinier, 2021, p. 135), which, in turn, serves as a means for IOs to forecast the competencies (e.g., knowledge, skills, attitudes, behaviours) individuals would need in the future global economy and valorise these competencies as the new requirements of educational reform (Rizvi, 2017; Kennedy et al., 2022).

The recent ‘soft skill’ initiatives among the IOs (e.g., OECD’s 2018 Global Competence Framework & 2022 Survey on Social and Emotional Skills), therefore, show how the ‘humanistic’ project of promoting student’s happiness, well-being, and non-cognitive outcomes of learning can be used to support neoliberal goals, which mirror their broader and core organisational ‘missions’. It also represents their response to the growing critique of their heavy focus on the human capital approach to education (for the advent of OECD’s humanitarian assessment, see Li & Auld, 2020). Such a shift in focus – or ‘the *rebranding* of assessment as a human right’ as Auld et al. (2019, p. 212) described – has, however, provoked academic debate. Scholars, such as Grey and Morris (2022), Oxley and Morris (2013), and Rizvi (2007) have criticised the way in which different ‘humanistic’ education initiatives, including creativity, lifelong learning and Global Citizenship Education (GCE), have been rearticulated using the language of neoliberal economic principles and human capital theory.

As will be explored in more depth in the following chapters, it is also notable that these assessments and policy directions promoted by IOs have been actively referenced and borrowed by individual countries, particularly those which have longstanding problems of ‘*unhappy*’, ‘*uncreative*’, and ‘*uninnovative*’ students as often evidenced by the PISA surveys. The PISA surveys, in particular, have long been identified as one of the key sources governments draw on to determine the ‘best practices’ of others (Engel, 2015; Sellar & Lingard, 2013), and many scholars argue that IOs are now one of the most, if not the most, influential agents in setting and diffusing norms, discourses, and values in the international system and within the nation-states (S. Park, 2006). A rapidly growing number of reports, conferences, and initiatives led by the IOs provide a discursive platform in which knowledge is created, shared, and diffused beyond national boundaries (Zapp & Ramirez, 2019; Zapp, 2021). Through this ‘discursive platform’, IOs can exercise what DiMaggio and Powell (1983) dubbed as *mimetic isomorphism*, which is ‘resulting from standard responses to uncertainty’ (p. 150). The drive to climb up the global league tables, such as PISA, and the desire to be positioned as a ‘good’ performer can facilitate the process of policy borrowing and, subsequently, policy isomorphism (Dobbins & Martens, 2012). While many comparative studies have examined the influence of IOs and their comparative instruments (e.g., PISA) on national education policies and identified an increasing convergence of education policies, they also highlighted how the countries’ respective historic and local contexts inhibit them from achieving ‘full’ convergence (Bieber & Martens, 2011; Michel, 2017). The viability and

validity of the concept of isomorphism, therefore, should be questioned, especially when trying to understand and explain why a country introduces a particular education policy.

This leads to the overarching argument of this thesis that the concept of ‘happiness’ does not denote a neutral concept and nor is there one universally agreed-upon definition. Instead, it is often disguised under ‘an abstract universalism of trans-nationally disseminated models, rules, and policies’ (Schriewer, 2012, p. 416), which later fans out into new shapes and forms as it interacts with country-specific characteristics in the course of implementation. While part of this thesis explores the emergence of the term ‘happiness’ as a policy keyword in the field of global education policy, particularly within the OECD, it also reveals how the meanings associated with happiness have changed over time. Also, while acknowledging the rise of the happiness discourse within the IOs and similar ‘happiness trend’ among East Asian regional neighbours, this thesis argues that South Korea’s (hereinafter, Korea) introduction of Happiness Education Policy (HEP) in 2013 should not be understood as the *outcome* of educational convergence but rather as driven by the evolving dynamics of domestic politics.

As Steiner-Khamsi (2010, p. 332) suggested, what is described as ‘isomorphy is often merely “global speak,” instrumentally invoked at a particular time and in a particular policy context, to accelerate policy change’. This thesis advances this understanding by demonstrating that policy isomorphism, especially in regard to student happiness discourses in education, is an overstatement and that the discussion of realities and local needs is often dismissed with a lack of recognition and understanding of the complexity involved in the policy borrowing process (see Bamberger & Kim, 2022).

1.2 Happiness Education

The origin of happiness as a concept can be traced back to nearly 2,500 years ago when the foundational philosophies were laid down by great thinkers such as Confucius, Socrates and Aristotle. As will be further explained in **Chapter 2**, Aristotle’s concept of *eudaimonia* illustrates that one’s happiness and human flourishing can be achieved through the development and cultivation of virtue (‘virtuous activities’) and that those who seek happiness must act as per virtue. In other words, happiness, in *eudaimonic* terms, is an activity

towards personal fulfilment rather than an emotional state. This idea of *eudaimonia* is often contrasted with *hedonia*, which views happiness as desirable not because of its own sake but because of pleasures and the absence of pain. Such a hedonistic conception of happiness was later taken up by two key figures of the Utilitarian philosophy – Jeremy Bentham and John Stuart Mill, who believed that the greatest happiness can be achieved by maximising happiness (pleasure) while minimising pain (misery) and that these actions are rational and morally right as long as happiness is considered as the only intrinsic good.

It is, however, only in the last two decades that this notion of happiness has been actively promoted. Following the adoption of Resolution 66/281 by the UN General Assembly in 2012 and the OECD's introduction of questions on student happiness and satisfaction at school in PISA, an increasing number of studies explored the relationship between student happiness and different specific variables (e.g., self-efficacy, academic performance, teacher and peer support, daily life routines) (Flynn & MacLeod, 2015; Lesani et al., 2016). Also, the concept of happiness has been widely embedded in educational policies across countries such as Finland, Bhutan, Japan, and Korea, as supposedly a more concrete concept (for Finland, see Yoon & Järvinen, 2016; for Bhutan, see Tshomo, 2016; for Japan, Kitamura et al., 2022; for Korea, see M. J. Kim, 2022). Happiness has been viewed either as a symbolic aim and purpose of education or as an outcome of a certain policy. Either way, the notion involves a myriad of meanings with no single agreed-upon definition, often ranging from relaxation, freedom, satisfaction at school (or sometimes broadly at life), emotional states (anxiety and depression), having a sense of autonomy of their own, to a moral goal of life. 'Happiness Education' initiatives have also been visible at an individual school level, if not at a national policy level, often using names such as 'positive education programmes', 'mindfulness education', and well-being sessions (Schonert-Reichl & Lawlor, 2010; Seligman et al., 2009; I. Morris, 2013).

This calls into question why the concept of happiness has gained popularity over the recent decades. A similar question has been asked of the preceding 'humanistic projects', such as lifelong learning and GCE, where many scholars argued that such humanistic notions often serve as a means to justify the introduction of new policy interventions (Elfert, 2015; Goren & Yemini, 2018; Oxley & Morris, 2013). In other words, different functions and latent goals have been (or can be) served by promoting these humanistic notions as an aim of education

policy. Both the outcome and the driving force behind this is the development of global education governance (for a discussion of cosmopolitan nationalism and the rise of the notion of global citizenship, see Maxwell et al., 2020). It is not a newly discovered phenomenon that global agencies, which previously focused on embracing human capital and economic principles and dismissed consideration of intrinsic and humanistic educational values (Rubenson, 2008), gradually took a ‘humanitarian turn’ by introducing a range of seemingly ‘humanistic’ and less instrumental educational visions and initiatives (Elfert, 2023; Li & Auld, 2020). Most notable examples include ‘well-being’ in OECD’s Better Life Initiative and Well-being frameworks, GCE, Lifelong Learning, and the promotion of ‘creativity’ not only in the OECD and World Bank but also in UNESCO. While there is a robust literature on these examples (see Boarini & d’Ercole, 2013; Elfert, 2017; Grey & Morris, 2022; Li & Auld, 2020; Oxley & Morris, 2013), there has been a serious dearth of literature – with the exceptions of S. W. Kim and L. Y. Kim (2021) and M. J. Kim et al. (2022) – that explores how the concept of happiness has been appropriated in both global and national education agenda, particularly that specifically looks into the role of the OECD in producing and facilitating ‘happiness’ discourses in education and the emergence and development of HEP in Korea.

Another driving force behind the emergence and spread of happiness discourses in education is what is described in the field of comparative education as ‘policy borrowing’ – or, alternatively, policy referencing or policy transfer. Scholars in the field have pointed out that, instead of (rather simply) identifying what is borrowed from one place to another, the act of policy borrowing needs to be explained and unpacked politically, historically, economically, and even culturally (see Steiner-Khamsi & Stolpe, 2006; Sung, 2011). What this thesis particularly attends to is the economic, sociocultural, and political contexts that influenced the ‘making sense’ of Korea’s domestic education problems, particularly the decision made by the Korean government and national policymakers to make references to – or, as Schriewer (1990) describes, ‘externalise’ – foreign examples of ‘Happiness Education’ to create legitimacy for new reforms (see also Schriewer, 2003).

But, as will be demonstrated in both **Chapter 2** (Literature Review), **Chapter 3** (Happiness Education in East Asia), and **Chapter 6** (Korean policymaking), although student happiness has often been promoted as a common goal across countries at a surface level, the rationales

underpinning each of these policy manifestations tend to vary vastly. Policies that promote student happiness as its goal often get reappropriated, resisted, or even rejected as per the country's needs and priorities. The aim of this thesis is also to demonstrate that a close look at Korea's HEP reveals that not many of these policies actually define what they mean by happiness (or unhappiness) and focus rather passionately on proposing the importance of cultivating 'soft skills', such as innovative, critical and creative thinking, through public education.

This brings us to an important point which I wish to establish early on; that is, happiness, as a policy jargon, is no longer some utopianistic vision of society but, as W. Davies (2015, p. 3) has put it, it is 'a measurable, visible, improvable entity...[which] has now penetrated the citadel of global economic management'. This thesis is not a philosophical study, nor a study that aims to argue for the importance of teaching students what happiness means and how to achieve it. Instead, the goal of this thesis is to reveal that, when it comes to educational policies, there is a myriad of meanings associated with the term and that they are often used as a 'floating signifier' that enables policymakers and politicians to introduce and expand their broader political and economic agenda whilst minimising potential opposition. It further demonstrates that unpacking the latent motives of the policy actors in their promotion of floating signifiers, such as happiness, is imperative. Central to the ways in which these humanistic floating signifiers are promoted lies 'sociotechnical imaginaries', creating anticipations of what a desirable future would look like. However, it is important to note that both floating signifiers and sociotechnical imaginaries have a nuancing effect on one another, and that it is not merely a one-way process. The promotion of floating signifiers, such as happiness, can influence the construction of imaginaries of the future, while these imaginaries, in turn, shape the interpretation of the floating signifiers. As a result, these anticipations and futuristic visions are readily embraced by the public and seldom subject to questioning.

1.3 Motivation and Rationale

For the past decade, in Korea there has been an astounding amount of media that featured the 'heavenly' and utopian nature of the Nordic education system, often vis-à-vis the depressing

domestic news on school bullying, teenager suicide rates, and the ever-increasing number of ‘repeaters’ of the annual university entrance exams (*suneung* in Korean) who strive to enter more prestigious universities. Often noticeable in these media reports and publications are the praise heaped upon the Nordic countries – for example, describing Finland as the “‘teacher” who ranked number 1 in public education’ (E. Choi, 2010, n.p) or identifying the education and social system of Denmark as a benchmarkable model (Oh, 2014). These fascinations are justified based on the outcomes of different ‘league tables’, most notably the OECD PISA rankings and the UN’s Happiness Index. Of course, such a media accentuation of all ‘Nordic’ education is nothing new although it is usually less than a handful of the Nordic countries that outperform others in International Large-scale Assessments (ILSAs) and are cited as ‘reference societies’ (for science literacy, see Kjærnsli & Lie, 2004; for school satisfaction and happiness at school, see Yoon & Järvinen, 2016). What also goes unspoken is that, in response to the students’ declining performance in PISA, countries such as Sweden have now reverted to traditional grading and testing system, as well as to a standard- and performance-oriented curriculum (Högberg & Lindgren, 2023). Similarly, following its initial PISA shock in the early 2000s, federal states in Germany, such as Bremen and Brandenburg, introduced ‘all-day’ schooling (*Ganztagsschule*) (Waldow, 2009). Nonetheless, the influx of media coverage and publications have been noticeable both within and outside Korea (e.g., Sahlberg & Walker, 2021).

The fascination for Nordic education has rendered numerous invited talks, visits, and conferences in Korea, both at ministerial and academic levels, where the topics ranged from Finland’s cooperative learning and happy school environment to Denmark’s Afterschool system (*Efterskole*). A documentary series on the Finnish education system filmed and broadcast by the Korea Educational Broadcasting System (EBS) in 2014 became sensational to the extent that the Seoul Metropolitan Office of Education Superintendent Cho Hee-yeon made an official visit to both Denmark and Finland in 2016 to learn more about their ‘happiness education’ models (Jo, 2016). The major focus in these talks, visits and television series, especially in the early and mid-2010s, has been the ideas of ‘whole person development’ (interchangeably used with ‘all-round development’ or ‘whole-child development’) and ‘character education’. The idea of whole-person development, in particular, has been receiving substantial attention in other East Asian countries, such as

Japan, Hong Kong, and Singapore, especially since the early 2000s, which emerged as the ultimate goal of curriculum reform (Chan, 2001; Forestier et al., 2016).

Interestingly, however, when the right-wing New Frontier Party (NFP) candidate Park Geun-hye announced her presidential bid for the 2012 election and pledged to undertake the ‘Happiness Education Policy (HEP)’ reform in 2012, the meanings attributed to ‘happiness’ were closely aligned with the government’s national economic vision of ‘creative economy’ and the ‘fourth industrial revolution (4IR)’. Particular emphasis was given to the ideas of creativity, innovation, and entrepreneurship (Korean Educational Development Institute [KEDI], 2016; Ministry of Education [MOE], 2016a; Pacheco Pardo & Klingler-Vidra, 2019), which not only represents a shift from a traditional manufacturing-oriented growth model to a new model, which had a significant implication for education policy as well.

These two factors – (i) the initial fascination and the subsequent referencing of global and education policy initiatives driven by the ‘league table’ culture; and (ii) the shift of focus from intrinsic happiness to ‘education for future citizens’ in the face of the 4IR – led to my interest in this topic. In particular, I was intrigued to understand why and how different meanings get associated with the same signifier and why the definition of ‘successful education’ changes over time.

1.4 Research questions

In the early stages of my research, my initial intent was to dedicate one of the earlier chapters to exploring different philosophical traditions that centred around happiness and examining how different philosophical underpinnings emerge in the contemporary conception of happiness. As my research progressed, however, I confronted the following *problematics*: first, there is already a sufficient number of studies narrating the history of changing conception of happiness, and hence there seemed to be little room for a novel contribution (e.g., Haybron, 2008; Wright, 2014). Second, limiting the scope of this philosophical inquiry to a couple of mainstream philosophies, such as Aristotle’s eudaimonia and Jeremy Bentham’s utilitarianism, could dismiss the voice of non-mainstream, indigenous philosophies. Third, as will be explained in the later chapters, the task to trace the genealogies

and align them with the contemporary conception of happiness was further complicated by the distinctive and oftentimes tokenistic use of the terms by different policy actors. Also, most importantly, just because a single policy document narrated that the goal of education is, for example, to enable students to live a good, flourishing life, it hardly explains whether they are following Aristotle's thinking of happiness as a goal in itself.

The focus of this thesis, which now departs from a genealogical-philosophical inquiry, seeks to explain the emergence and manifestation of student happiness and, more generally, well-being discourses in educational policies. Also, it explores how specific vantage points, such as the level (global, national, and subnational), geographical location, and time, can reveal how these policies and notions of student happiness are understood and practised by school-level actors in their day-to-day school life. Hence, these lines of inquiry can be subsumed under the following overarching question:

How do different education actors interpret and relay the meanings attributed to happiness?

The research questions for my three analysis chapters are divided global, national, and school levels. The reason for such a vertical structure is to identify not only whether or not there have been deviations in how the concept of happiness (or well-being as a general term) has been interpreted differently according to the level each education actor belongs to, but also to tie these interpretations into the aims of education which actors at different levels pursue.

Research question 1: (i) How and why is the notion of happiness promoted in the field of education policy, and (ii) how has it been framed in the OECD's education agenda over the past decade, and why?

The first part of this research question (RQ) is addressed in **Chapters 2, 3, and 5**. It focuses on (i) how and why the notion of 'happiness' has emerged as a 'humanistic' policy signifier and the role it plays, (ii) how the notion of 'happiness' has been conceptualised in four East Asian societies (Japan, Singapore, China, and Hong Kong) and (iii) in the works of the OECD as the leading global agent of education, and for what purpose.

Among many international organisations, the influence the OECD had on Korea's domestic education policy is particularly substantial (Bamberger & Kim, 2022; Shin & Joo, 2013).

However, while many studies have looked at how and why the OECD promotes its ‘humanistic’ education projects, such as global citizenship and PISA for Development (Auld & Morris, 2019; Auld et al., 2022), the OECD’s role and influence in driving ‘happiness discourses’ in school education policies has been underexamined, which is where this thesis makes its contribution. Another reason why this thesis focuses specifically on the OECD is because of the explanatory power the Organisation has exerted through both the expansion of PISA and the more recent role it plays in driving the ‘future education’ discourses through the 2030 Learning Framework.

To address the second part of the RQ in **Chapter 5**, I draw on multiple sources, such as the OECD reports, press releases, blogs, and working papers and illuminate the changes in the OECD’s conception of happiness over the past decade. The discussion of these changes is situated within the broader context of legitimacy, the Organisation’s sociotechnical imaginaries, and its alignment efforts with global goals such as the Sustainable Development Goals (SDGs).

Research question 2: How and why was Happiness Education Policy (HEP) promoted in South Korea and what conception of happiness did it embody?

This question addresses how the same concept is understood and promoted in Korea; a country that has consistently ranked as one of the top-performing countries in major ILSAs, namely the PISA and the TIMSS (Trends in International Mathematics and Science Study). The decision to focus on Korea for this research was not a hard one to make. The country’s success in ILSAs came at the cost of student well-being, marked by psychological distress due to excessive competition for entrance exams and long hours of studying – not to mention the highest suicide rate among the OECD countries and its continuing poor performance on the PISA’s measurement of student well-being (Sellar et al., 2017, p. 63; Waldow et al., 2014).

With the slogan ‘Happiness Education for All: Creative Talents Shape the Future’, in 2013, Park Geun-hye's right-wing New Frontier Party (NFP) government (2013-2017) proclaimed ‘Happiness Education’ as a new public K-12 education framework with a vision to encourage students to develop their dreams and talents. The Park government’s ‘Happiness Education’ discourse was, however, more than a holistic approach to education; as will be discussed in

later chapters, the objectives of its ‘Happiness Education Policy’ (HEP) were directly linked to the government’s larger economic goals to drive the country into the so-called ‘creative economy’, which ‘encourages new technological innovations and a convergence of different industries such as science, information technology (IT) and culture’ (R. K. E. Park, 2016, p. 9), and into the fourth industrial revolution. Policy actions introduced as part of that framework, such as the Free Semester Initiative, continued to be promoted and expanded by Moon Jae-in's left-wing Democratic Party of Korea (DPK) (2017-2022).

The inquiry will involve a transversal analysis to trace how these two governments attributed specific meanings to happiness in their educational reforms. Through an in-depth documentary analysis of policy documents, press releases, MOE blogs, news articles, and interviews with Korean policy intermediary actors, I reveal how happiness, as a floating signifier, has been redefined in ways that align and support the different sociotechnical imaginaries envisioned by political regimes over the past decade which depart from its humanistic focus. In so doing, this thesis contributes to the extant literature in comparative education by illuminating why comparing the enactment of education policies with similar aims in different countries ‘at a singular point in time after its implementation’ (Bamberger & Kim, 2022, p. 15) is problematic.

Research question 3: How do school-level actors (teachers, school leaders and education professionals) understand student happiness and well-being and their role in promoting them, and why?

The final aim of this thesis is to identify the disjuncture between macro-level policy rhetoric on student happiness and the micro-level practices at schools. To address the third RQ, **Chapter 7** explores the micro-level practices at schools through an interrogation of how school-level actors (teachers, school leaders, and education professionals) understand the importance of student happiness and their role in promoting it is crucial. The findings contribute to the extant literature on comparative education by providing a specific example of how educational ideas such as ‘happiness’ undergo constant resignification and reinterpretation as they travel across space (Cowen, 2009a).

1.5 Paradigms and Perspectives

Taking the historical development of the field of comparative education into account, this thesis categorises the field into two large groups of scholars. The first group envisages comparative education as analogous to positive science. Positive science, or positivism or scientism, is the philosophy which only supports scientifically verifiable physical facts. This group believes that the origin of comparative education can be traced back to the early 19th century, when Marc-Antoine Jullien (1817), often referred to as the founder of the field, advanced the application of scientific logic to the understanding of comparative education. While there have been others who observed and compared schools cross-nationally before Jullien (e.g., Georges Cuvier), Jullien's approach to systematically observing nomothetic relationships across cultural and subnational units (e.g., cantons of Switzerland) set the first stage for the *science* of comparative education (see also, Epstein, 2017; Manzon, 2011). The primary objective was to collate, compare and analyse education data collected across nation-states, advancing that these scientific data serve as evidence to identify the best practices and to develop universally applicable education principles that would work in different contexts. Such a positivist approach reappeared in the field of comparative education from the mid and late 1960s (Cowen, 2023) and continues to underpin many works in the field that seek to explore the multifaceted forces and conditions shaping education practices in different cultural settings.

There have also been arguments, especially from scholars such as Holmes and Robinsohn (1963, p. 153), that it is possible to 'predict which country is the one most likely to introduce a [certain] system next' or the various possible outcomes of policy adoption. Such an emphasis on scientific knowledge remains in the contemporary approach, particularly in 'rational', evidence-based policymaking (see Auld & Morris, 2014; Crossley, 2014). The OECD's approach to education policymaking and the policy solutions it provides to countries, for example, often lie on its scientific expertise in large-scale empirical assessments, such as the PISA and the *Education at a Glance* project (Lewis, 2017; Zapp, 2021). However, criticisms of this positivist approach were made as early as the mid-20th century, where scholars such as Nicholas Hans (1959, as cited in Kazamias, 2009) argued that:

within the limits of one country, where the terminology is identical and social conditions do not greatly vary statistical methods may be employed with profit and may lead to some valid conclusions ... [whereas for international comparisons] we meet with so many difficulties that is doubtful whether we can arrive at any valid results. (p. 447)

Cowen (2023) also argues that the ‘muddle was, and is, that the academics involved judged that their debate was about methodology’ (p. 12) and that the reality is more complex than that – for example, requiring some unpacking of both the earlier professional identities of the academics involved and their respective epistemological visions.

In more recent decades, there has been greater diversity in the chosen foci of content or comparison, whether it is cross-national, cross-scalar or across time (see Bray, 2004; Wahlström et al., 2018). This brings us to the second group of scholars who put social scientific disciplines – including anthropology, history, or post-structuralist perspectives – at the centre of their inquiry (Cowen, 2014; for anthropological inquiry, see Anderson-Levitt, 2003, 2012; for a ‘revised’ historical approach that incorporates history and social science, see Kazamias, 2001). Their origin lies in the early comparativists’ works that placed great emphasis on understanding the situation ‘at home’; most notably, in the late 19th century, Michael Sadler saw the importance of unpacking socio-historical context when studying foreign education systems (see also Phillips, 2020). Hans (1959) also suggested that any interpretation of comparative statistics should be complemented by historical analysis of respective national traditions.

Accordingly, many scholars in the field have sought to understand national and local responses to transnational education policies. Scholars, including Steiner-Khamsi and Waldow (2018), Rappleye (2012a), and Wahlström (2018), explore the nature of domestic politics underlying the policy borrowing process. There is also a growing interest in how policies are mediated and recontextualised at different levels and how these recontextualised policies reflect sociocultural or political differences and sometimes result in unexpected policy outcomes. Using anthropological perspectives, Anderson-Levitt (2003, 2012) and Schulte (2018) advance our understanding of the cultural meaning-making process and how this process occurs at various policy levels. These scholars emphasise the interaction of global forces with local momentum and agency, particularly how people draw on historical, cultural, and social resources (e.g., norms and ideas) to translate and reconstruct the travelling ideas (Anderson-Levitt, 2012).

The epistemological framework of this thesis falls closer to this second group. It falls within a constructivist paradigm, seeking to understand the multi-purpose use of the notion of

happiness as a policy signifier and argues that the meanings attached to it often vary, hence a need to grasp the complex process of policy borrowing at global, national and school levels. The analytical approach of this thesis is greatly inspired by the Comparative Case Study (hereinafter, CCS) framework proposed and developed by Lesley Bartlett and Frances Vavrus (see Bartlett & Vavrus, 2017). CCS is a complementary approach to – or an extension of – traditional single-sited ethnography. Unlike predominant approaches to case study research, the CCS framework is essentially process-oriented, meaning that it attends to the tracing of how and why a certain phenomenon takes place. Bartlett and Vavrus (2017) suggest that to unpack the complex dynamics behind a certain phenomenon, it is crucial to analyse it in terms of its verticality (macro, meso, and micro dimensions), linkage with transversality (e.g., history and time), as well as horizontality (e.g., how the same phenomenon unpacks in different locations).

Likewise, the analysis of this thesis extends beyond a vertical comparison by level, wherein I believe that both horizontal (how the same concept is understood differently within the same actor group) and transversal (how its conceptualisation and application changes over time) elements play equal importance in explaining why a ‘phenomenon’ is interpreted in a particular manner. It is important to note that, in this thesis, a phenomenon is defined as a pattern that has become more observable in more recent years but is also difficult to fully grasp, trace, or explain its origin. A particular phenomenon may appear with several different manifestations, and this is why its emergence and manifestation should not be arbitrarily attributed (or narrowed down) to a simple causality. It is rather entangled with a complex set of interlocking factors and, as Bartlett (2014) argues, by analysing a phenomenon from a multi-dimensional point of view (i.e., vertical, horizontal, and traversal lens), the field of comparative education can eventually overcome the longstanding dilemmas of culture, context and comparison.

The CCS approach is adopted in this study in three different ways. For the vertical analysis, this thesis compares how the notion of happiness is conceptualised differently at three levels – the global, the Korean national policy, and at school levels. This vertical investigation was conducted through document analysis in **Chapters 5** (global/OECD) and **6** (national policy level), through a school-level actor questionnaire in **Chapter 7**, and a series of in-depth interviews in **Chapters 6** (national policy level) and **7** (school level). The findings obtained

from these three methods are then compared to explore whether the discourse of happiness arising from each level concurs with, or differs from each other.

For the transversal dimension, this study investigates how these concepts have been creatively appropriated and practised across time. There are two transversal comparisons: first, **Chapter 5** traces changes in OECD's conceptions and measures for well-being in education between 2012 and 2021. Then **Chapter 6** examines the ideological shifts at the policy level from the right-wing New Frontier Party (NFP) government (2013-2017) to the subsequent left-wing Democratic Party of Korea (DPK) (2017-2022). The purpose of incorporating the final axis – horizontal analysis – into this study is to reveal that the intersection(s) between level, place, and time did not just happen between the OECD and Korea. **Chapter 3** offers an overview of how Happiness Education (or well-being and happiness as core policy concepts) emerged as a policy phenomenon not just in Korea but also in multiple locations, particularly in East Asia (see Takayama, 2007). Also, **Chapter 7** entails a comparison of questionnaire and interview responses between different school-level actors, which intends to understand whether their understanding of the aims of education and student happiness vary by their prior experience, the grade levels they teach, or their state of occupation.

With three levels of education actors (global, national, and school levels) in question, this thesis unpacks their respective expectations and motivations for promoting happiness. At the surface level, the country's search for best practices deviates from a conventional neoliberal logic of policy borrowing, as the introduction of 'happiness' as a policy signifier means that the country is prioritising student happiness and well-being rather than an enhancement of academic performance. However, the country's interest in foreign models of student happiness can also be understood as another form of global competition driven by the cross-national surveys disseminated by supranational bodies such as the OECD.

Additionally, while this thesis identifies the rise of happiness discourse in global education policies as a recent trending phenomenon, especially across East Asian countries, it argues that there is no substantial evidence to suggest that there has been a regional diffusion, policy 'convergence', or an 'isomorphism' in the ways the concept has been incorporated into global education agenda and respective national education policies. As will be explained in depth in **Chapter 2** (Literature review), since the meanings attached to 'happiness' and 'Happiness

Education' policies tend to differ, it would be a hasty generalisation if one argues that there has been an occurrence of world culture or a policy convergence on Happiness Education. In that, my perspective has been greatly shaped by Cowen (2018, pp. 22-23), who suggested to:

[look] backwards and [ask] of the archives what is missing, or not yet revealed, in earlier efforts to grasp the remarkable complexities and modalities of 'transfer' and shape-shifting as – themselves – expressions of international power.

It is hoped that this thesis could advance the understanding of recontextualising roles of three different education policy actors (i.e., the OECD as an international organisation; the Korean government and policymakers; and school-level actors), particularly on how they define, relay, and reappropriate the concept of happiness in their policies and practices of Happiness Education, and why.

1.6 Significance

Some of the potential contributions of this thesis are already laid out in the preceding sections. Many academic works self-labelling as 'comparative educationists' or 'doing comparative education' often end up merely focusing upon 'comparing education domestic' (that they are familiar with) and 'education overseas' (using the one the researcher – or the country they live in – deemed as aspirable). This has been one of the three banalities Cowen (2006) identified as arising in the field. Similarly, Dale and Robertson (2009) also argue that three objects, 'national' 'education' 'systems', have been the core units of comparison in the field of comparative education. This thesis aims to build on the literature which raises concerns about the works that are trapped within 'methodological nationalism' paying less attention towards the local and sociocultural embeddedness of a phenomenon (Dale, 2005). One of the methodological contributions this thesis makes to the field of comparative education hence derives from recognising and stressing the 'pluri-scalar' nature of the governance of education (ibid.). By employing the three-dimensional (i.e., horizontal, vertical, and transversal) approach, this thesis stresses the importance of attending to multiple axes of comparison – space, time, and level – as a way to explore the relation between context and transfer in a deeper sense.

An in-depth analysis of each dimension advances the claim that when an idea (i.e., student happiness) transfers from one location to another (e.g., from OECD to Korean national

polycymaking level), the original meanings attached to the idea hardly remain static and fixed over time. Instead, both the idea and its meanings are subjected to continuous interpretations and translations (see Cowen, 2009a) – for example, during the transitions of governments or its transfer from policy to practice or school levels. It could even be argued that this multidimensional approach could become a solution to escape the fallacy of methodological nationalism and even the problematic world-culturalist dichotomy of global versus local. There has been a growing number of studies employing a pluri-dimensional framework to advance their multi-sited or multi-scalar research (Bellino, 2016; Sakata et al., 2021; Schuelka, 2018). The core interest of these studies lies in inquiring into how contextual settings (e.g., history, sociocultural values and norms, the political structure, and international relations) influence policy appropriation, implementation and practice across time in different settings and scales. Therefore, the multidimensional approach this study pursues is a bolder methodological experiment in this field of comparative education – somewhat building up on Bray and Thomas’s (1995) Three Dimensional Cube in which the temporal axis is more or less ignored – but it is not unheard of.

Additionally, there has been a lack of research – apart from S. W. Kim and L. Y. Kim (2021) and M. J. Kim et al. (2022) – on the broader political and economic rationales embedded in ‘Happiness Education’ narratives and their implications for national policy formulation and implementation. The overarching focus of this study, therefore, is to explore the underexamined topic of (i) the term ‘happiness’ as a policy keyword; and (ii) what meanings have been attached to it. It specifically sheds light on the disjuncture between macro-level policy rhetoric on happiness in education and the micro-level practices at schools.

In so doing, it contributes to the extant literature in three ways. First, this thesis argues that the emergence of HEP in Korea needs to be understood and situated within the contextual grounds of historical, global and domestic factors which prompted the discursive shift of educational goals from cognitive outcomes to student happiness and well-being. Second, it demonstrates that the concept of student happiness remains a polysemous construct at both polycymaking and school implementation levels. It advances the understanding of recontextualising roles of both policy- and school-level actors, focusing on how they define, understand and reappropriate these concepts either to serve the political and economic interests of the state or to fulfil their daily roles, and long-term aspirations as pedagogic actors.

Developing upon this second point, this thesis finally argues that the concept of ‘happiness’ is already functioning as a ‘floating signifier’ at both levels and that it may suffer the same fate of being dictated by a narrow functionalistic focus on competence and skills as already experienced by other humanistic education initiatives such as lifelong learning and GCE.

1.7 Thesis structure

This thesis is structured into eight chapters, including this introductory chapter. Each chapter serves as an evidential basis as to why any education policy that promotes student happiness (or generally, well-being) must beware of using it in a tokenistic manner or of delimiting its conceptual space to a single fixed dimension (e.g., economic well-being, subjective happiness, student happiness here-and-now).

Chapter 2 addresses the first part of **RQ 1-i**. It explores theoretical literature on policy signifiers and then looks at how different types of signifiers have been employed in the extant literature. It then sketches the various conceptual understandings of the term happiness. The review then devotes substantial attention to the role of international organisations and how they operate in the arena of global policymaking. The second part of the review looks at: (i) how and why the transfer (or borrowing) of policy discourses occurs, particularly focusing on the domestic policies behind this; and (ii) the national and local responses to and translations of the ‘travelling policies’.

Chapter 3 reviews major education reforms related to ‘happiness’ and ‘well-being’ across four East Asian societies (Japan, Singapore, China, and Hong Kong). It first explores the political and economic background to the emergence of these reforms and the commonalities and differences in how each society sought to address the issues of low levels of student happiness and well-being.

Chapter 4 addresses the methodological framework of this thesis, along with the discussion of an epistemological and ontological stance that underpins this research. It also engages with the specifics of different research methodologies used for each level of analysis, as well as with potential ethical issues and methodological limitations.

As stated in the earlier section, the findings are presented in three separate chapters: **Chapters 5, 6 and 7**. First, **Chapter 5** addresses **RQ1-ii** by interrogating how the concepts of happiness and well-being have been (re)constructed and co-opted in the OECD education initiatives over the past decade. It focuses on the materials produced about the last three PISA assessments (2012, 2015, 2018), the Organisation's Future of Education and Skills project, and the recent 2021 Survey for Social and Emotional Skills. Here, I reveal that the focus of their conceptions has shifted over the past decade as per the following themes: (i) critique of emphasis on the human capital approach to education; (ii) the goal to expand the measurement of learning outcomes beyond the cognitive domain; and (iii) the wider call for sustainable development and future education. Some of the findings from this chapter are already published in Korean (see M. J. Kim et al., 2022).

Chapter 6 then focuses on how and why Korea turned to the concept of happiness. To establish the legitimacy for the re-installment of the conservative party, in the 2013 election, the right-wing NFP government proposed to make a transition to a welfare state using happiness as a reform keyword. With the slogan 'Happiness Education for All: Creative Talents Shape the Future', in 2013, the NFP government (2013-2017) proclaimed Happiness Education (*haengbok gyoyuk*) as a new public K-12 education framework with a vision to encourage students to develop their dreams and talents. Through closer scrutiny of materials related to the Happiness Education Policy (HEP), this thesis reveals that HEP emerged as a solution to restore the essence of education pertaining to global, sociocultural, political, and economic factors. This chapter then extends the analysis by comparing the NFP government's use of happiness as a floating signifier with that of the subsequent left-wing Democratic Party of Korea (DPK) (2017-2022) as the objectives underlying the promotion of happiness through education vary by context and time. In so doing, this chapter answers **RQ 2**. It should also be noted that the findings from this chapter have been published as journal articles (see M. J. Kim et al., 2022; M. J. Kim, 2022).

With that, the last analysis chapter (**Chapter 7**) is dedicated to analysing how this nexus of happiness and education is constructed in the minds of school-level actors. The materials analysed here are the surveys submitted by a total of 50 school-level actors (teachers, school leaders, and education professionals) and 10 follow-up semi-structured qualitative interviews.

The chapter aims to gain insight into how school-level actors relate their day-to-day practices with their students' happiness and how they describe their roles in promoting them.

Finally, **Chapter 8**, as the concluding chapter, brings together the findings and discussions of the previous chapters. It then explores how this thesis contributes to knowledge and the extant literature, particularly on the following aspects: (i) the importance of examining how policy signifiers are used and what sociotechnical imaginaries they embody; (iii) the role of nation-states in constructing and delineating visions of education; and (iv) the role of 'academic comparative education' as a field. Finally, I reflect on the potential limitations of this thesis and highlight future research that could arise from this study.

Chapter 2 Literature Review: From Individual Pleasure to Communal Harmony to Happy Workers

2.1 Introduction

As noted in **Chapter 1**, there have been active attempts at both global and national levels to introduce a seemingly ‘humanistic’ signifier as a mantra to advance a particular economic and political agenda (for sloganisation of lifelong learning, see Dehmel, 2006), or as an overarching goal of reform. I also stated that one of the aims of this thesis is to analyse how such a signifier is used and legitimated at policy levels and, by using it, what politicians and policymakers can achieve. In this chapter, I draw on relevant bodies of scholarship that provide insights into the processes that enable a polysemic signifier with no specific meaning: (i) to be aligned with the macro objectives of the institution that employs the signifier; (ii) to travel across national and transnational boundaries; and (iii) to be subjected to further translations facilitated by the floating nature of the signifier.

There has been a wide range of terms such as but not limited to joy, (subjective) well-being, social and emotional learning, student unburdening and freedom that are often used interchangeably with the notion of ‘happiness’. Scholars such as Theobald and Cooper (2011, p. 13) differentiated happiness from well-being by describing the former as a sense of ‘complete fulfilment’ and the latter as a ‘state of contentment’. The notion of social and emotional learning (SEL), on the contrary, refers to an educational method, instead of a state of mind, that seeks to cultivate ‘positive attitudes, prosocial behaviour, and improved well-being and academic learning’ of students (European Commission, 2022, para. 2); hence, when SEL is introduced as a policy initiative, it involves specific evidence- and skill-based curricular approaches such as the Collaborative for Academic, Social, and Emotional Learning framework (also known as CASEL framework) (CASEL, 2003; Zins & Elias, 2007). The first two parts of the review focus on clarifying the conceptual underpinnings of the key terms used in this thesis. The first part explores the ontological debate on what the term signifier refers to, illustrating the different functions of signifiers by briefly examining their three different typologies: empty, floating, and thick signifiers. The second part illustrates the complexities and ambiguities relating to the terms ‘happiness’ and ‘Happiness Education’.

A central assumption running through this review is that, while nation-states also have their interest in adopting non- or less-instrumental and humanistic signifiers, the role of international organisations (IOs) as influential agents in education policymaking, especially as producers, diffusers and even ‘brokers’ of evidence-based knowledge and global educational culture, should be examined to understand the emergence, diffusion, and most importantly, justification of these signifiers (Grek, 2020; Resnik, 2006). Therefore, the third and fourth parts of this review examine the role of IOs, as outlined in the extant literature on international relations (IR) and global education governance, and how they operate in the arena of global education policymaking. These are followed by an examination of the domestic politics behind the transfer and borrowing of policy discourses and signifiers, particularly on how nation-states, by using the slogans, discourses, and data produced by the global agencies, legitimate the introduction of what may be considered as ‘controversial’ policy reform and changes.

2.2 (Diss)association of meanings: Using signifiers in policy language

Briefly drawing on the relevant linguistic research, this section introduces the background of the term ‘floating signifier’ (Laclau, 1996): a signifier which continually slides between different – oftentimes contradicting – projects depending on the nature of the project for which the signifier is employed. The section then incorporates the literature on public policy and education policymaking to demonstrate that the function of a signifier varies depending on how its meaning is constructed.

2.2.1 The origin of the term signifier

The term signifier first appears in the work of Ferdinand de Saussure (1989) on linguistic structure. According to Saussure, a signifier is a linguistic form such as a word, and the term signified refers to the mental image and the meaning of the signifier. The relationship between the signifier and the signified is described as arbitrary and fluid, but also relational; that is, the meaning of a signifier is acquired by its relationship with other words within the system. Tree, for example, is a good example to explain this relationship between the signifier and the signified. In Saussure’s notion, the word ‘tree’ does not refer to the physical object of the

tree, but rather the psychological concept of the tree. To understand the word ‘tree’, one needs to have an understanding of other words like branch or bush and how these words are *related* to the tree. In other words, there is a contingent attachment between the signifier and the signified, and it is from this nexus of relations that the meanings emerge.

Gustave Le Bon (1896), a French social psychologist, also argues that the power of the signifier depends on the images and impressions the word evokes. He explains:

Words whose sense is the most ill-defined are sometimes those that possess the most influence. Such, for example, are the terms democracy, socialism, equality, liberty, etc., **whose meaning is so vague that bulky volumes do not suffice to precisely fix it.** Yet it is certain that a truly magical power is attached to those short syllables, **as if they contained the solution of all problems.** They **synthesise the most diverse unconscious aspirations and the hope of their realisation** (p. 100, my emphasis)

Le Bon then argues that some of these poorly defined words are difficult to question or oppose, especially when the words are ‘uttered with solemnity in the presence of crowds’ (ibid.). Similarly, in his 1946 essay *Politics and the English Language*, Orwell criticised how political words such as democracy and justice are used in a *consciously dishonest* and obfuscating manner – in the worst case, with an intent to deceive the audience. The power these words hold through their vagueness, however, is not indefinite and their original meanings can be lost over time and across different settings (see also Bamberger & Kim, 2022; M. J. Kim, 2022).

Relational approaches in phenomenology provide insights into why ‘happiness’ as a policy signifier is likely to take on different meanings in different settings. In his book *Logical Investigations (Logische Untersuchungen)*, Edmund Husserl (1970) argued that what is ‘expressed’ is not necessarily identical to what it ‘indicates’; that is, the connexion between the signifier and the signified is weak. According to Derrida (1982, p. 11), ‘every concept is inscribed in a chain or in a system within which it refers to the other, to other concepts, by means of the systematic play of differences’. In other words, the intended meaning of a signifier can only be understood and defined when one traces other related signifiers that are also present in the system. Similarly, the intended *signified* of the word ‘happiness’ is dependent on a temporal chain of signifiers – a chain which enables its meaning to be relayed from one signifier (e.g., well-being) to another (e.g., mindfulness) – and, hence, is bound to constant resignifications.

Also, from the semantic point of view, to translate a word from one language to another, one has to consider the meaning – or *meanings* depending on the concreteness of the word – associated with it. Several behavioural and psycholinguistic studies conducting experiments using lexical decision and word naming tasks demonstrated that both acquisition (e.g., by second language learners) and translation (e.g., by bilingual speakers) of concrete words tend to be less dependent on context or associated words for their interpretation (for translation experiment, Tokowicz & Kroll, 2007; for the perspective of language acquisition, Mestres-Missé et al., 2007). There is also an argument that the *concreteness* of a word is never fixed, for example, due to the contingent attachment the signifier has with the signified in Saussure’s framework of the linguistic system. Myachykov and Fischer (2019), for example, argue that a word can both be concrete and abstract if it is examined along the following three dimensions: (i) grounding (whether or not a word has a physical or material referent with a phenomenological experience); (ii) embodiment (whether or not a word has an associated sensorimotor experience); and (iii) situatedness (the extent of concreteness depends on its contextual flexibility). When applying these three dimensions to the signifier of this thesis – happiness – it is notable that having no agreed physical or material referent makes the term abstract, whereas, with the signifier’s frequent association with positive emotions (e.g., joy, contentment) and satisfaction, as Derrida (1982) argued, the signifier could be classified as ‘concrete’ due to its embodied sensorimotor experiences. Lastly, as explained later, while happiness can have a concrete sensorimotor representation with its association with positive emotions, if one refers happiness to the Aristotelian notion of *eudaimonia*, the signifier appears to be a more abstract concept.

2.2.2 Signifiers in policy language

Political signifiers can be distinguished into three types according to the way they are used, which are: (i) thick; (ii) floating; and (iii) empty signifiers (Huysmans, 1998; Saussure, 1989). In the 1990s and even early 2000s, political scientists such as Huysmans (1998) and Kinnvall (2004) problematised the underdevelopment of the meaning of ‘security’ and suggested that it be understood as a ‘thick signifier’. Thick signifier analysis was then developed as an analytical approach based on Saussure’s theories of sign systems. Huysmans (1998) states that thick signifier analysis can push the conventional conceptual analysis a bit further.

Instead of trying to clarify the meaning of a signifier by dismissing ambiguities and inconsistencies in its use or proposing the most precise term (e.g., ‘natural security’ instead of security), a thick signifier approach treats the word as ‘self-referential’ (ibid., p. 232). When a word is used as a thick signifier, social relations embedded in the word are brought to life, ordering and ‘positioning people in their relations to themselves, to nature and other human beings within a particular discursive, symbolic order’ (ibid.). If we use the word ‘security’ as an example, as a thick signifier, it dictates how its practices (security practices) are articulated and interpreted and how the people involved in such a situation (e.g., migrant crisis; war) are positioned. Hence it sheds light on something beyond ‘an unproblematic axiomatic condition’ (Mustapha, 2011, p. 490) and how the signifier could advance a particular way of defining social relations.

A ‘floating signifier’, on the other hand, is a signifier that has multiple referents; that is, the *signified* of this signifier is floating in nature and can be articulated differently according to the settings and projects in which a signifier is employed. The concept of floating signifier originates with Lévi-Strauss (1987), where he used the example of ‘mana’ to illustrate its lack of symbolic value. In his formulation of the structure of symbolic exchange, Lévi-Strauss viewed the relationship between the signifier and the signified as complementary units. He described the symbolic exchange between the two as operating through exposure to what he termed a ‘signifier-totality’ (ibid., p. 63), with individuals constantly seeking to allocate what they find as an adequate signification. In this context, the concept of floating signifier emerges from ‘the lack or inadequation or surfeit of signifiers to signifieds, of symbols to the symbolized’ (Jensen, 2020, para 20). The flexibility of this floating signifier enables resignification of the concept over time or in different settings (Beech, 2009), which then often gets abstracted and dislocated from their historical and political contextual complexities (Sousa, 2017). Instead, new meanings, which can flexibly accommodate the interests of relevant stakeholders, are attached to the signifier. These new meanings get legitimated when they are articulated in a manner in which the public is convinced or finds it difficult to oppose (Krejsler, 2017).

Several studies on policy buzzwords explored this further, arguing that the current political climate has taken up abstract concepts in global discourses such as quality (Pechmann & Haase, 2022; Unterhalter, 2019), sustainable development (Kögl & Kurz, 2013), and global citizenship education (Morases, 2014), and implemented them nationally to configure new

political and economic agendas and align them with their interests. For example, one would find it difficult to reject a proposal titled ‘quality education’, especially when the term is backed up by global discourses such as human rights, the SDGs, and lifelong learning. The notion of ‘happiness’ resonates effectively with these instances, operating without a universally accepted definition. As Lévi-Strauss contended, individuals assign distinct meanings (‘signifieds’), such as mindfulness, well-being, and pleasure, to the term ‘happiness’ (‘signifier’), in light of the emergence of novel demands presented by new social agents. While, at the surface level, these concepts seem to be open to a multiplicity of interpretations, it is often the case that the concepts, in reality, are narrowly employed, or even worse, distorted as they are (re)aligned with the broader agenda driven by the ‘globalisation project’ of both IOs and national policy actors and their extant measurement schemes (see Robertson & Dale, 2015; Unterhalter, 2019). This, overall, resonates with what Sardoč (2022) describes as ‘third-wave neoliberalism’, akin to what Brenner and Fraser (2017) depicted as ‘progressive neoliberalism’, wherein different progressive movements, such as feminism, multiculturalism, equality, or empowerment, are effectively conjoined – or wittingly picked up – by the forces of cognitive capitalism. Sardoč (2022) argues that this recent phenomenon of embracing egalitarian vocabularies and emancipatory ideas, such as justice, fairness or well-being, is far from a transition from neoliberalism to a more progressive paradigm, but rather represents a ‘seismic semantic shift in the vocabulary of neoliberalism’ (ibid., p. 1728), or even depressingly, a ‘neoliberalism with a human face’ (ibid., p. 1730).

Lastly, an ‘empty signifier’ implies that a *signifier* is in absence of a *signified* (Laclau, 1996). The notion has often been used interchangeably with the notion of ‘floating signifier’ in the different fields of literature, mainly due to their shared characteristic that the signifier is ‘unfixed’ on a certain meaning or the *signified* and that one needs to understand the intent behind their use. It is also argued that both floating and empty signifiers serve as ‘key tools for discourses in mobilising consent and achieving hegemony’ (MacKillop, 2018, p. 188). However, according to Laclau (2005, pp. 130-131), an empty signifier emerges when there is a chain of unsatisfied demands, which, in its particularity, may be unrelated or even contradictory in nature, and when these demands are gathered under one name because they are ‘equivalent’ in a sense that they are all opposed to the dominant, oppressive structures and regimes of power. When one of these demands gains political popularity and becomes the

‘signifier’ of the whole chain, it then *represents* all the demands while simultaneously obscuring the totality of their respective meanings and identities (Crespy & Vanheuverzwijn, 2019). Hence, an empty signifier should be differentiated from a floating signifier, as the latter emerges when there are further attempts to incorporate new demands (i.e., new political actors and their agenda) and, in so doing, reconfigure the existing chain of demands (i.e., the meanings that constituted the original signifier). An example of an empty signifier is the notion of ‘sustainability’ which, despite the abstractness and lack of measurability of the term, continues to play an active role in both reflecting and expressing the need for a substantial change for the sake of the ‘future’ of humanity (Brown, 2016). More *seemingly* concrete and technical notions, such as ‘nanotechnology’ (Wullweber, 2008), are also argued to be empty signifiers because of their continuous detachment from, and subsequent reattachment to, different socio-political contexts, due to the shifting anticipations surrounding the futuristic discourses.

2.3 Different conceptions of ‘Happiness’

This thesis argues that happiness is another floating signifier legitimated by the humanistic and empathetic meanings and aspirations the term conveys. Its potential as a floating signifier is amplified by the fact that happiness is a term that one cannot disagree with. To do so would suggest one desired its opposite; unhappiness or miserableness. However, the term happiness is amorphous and elusive, with varying explanations of what it means precisely and what constitutes happiness. This section, therefore, sketches a range of ways the concept of happiness can be understood. This involves an interrogation of the different meanings and sub-concepts that the notion of happiness has often been tied to – most notably, human flourishing and well-being – substantiated by making linkages to different philosophical or psychological foundations of happiness (i.e., Aristotle’s *eudaimonia*, Aristippus’s hedonism, Jeremy Bentham and John Stuart Mill’s utilitarianism, Korea’s *Hongik Ingan* ideal, as well as behavioural and positive psychology). This transversal investigation of the philosophical origins of happiness and how, in more recent decades, the rise of the positive psychology sub-discipline has shared more modern understandings of happiness is useful for this study to later explore which meaning(s) of happiness the OECD, Korean policy actors and school-level actors associate themselves with (**Chapters 5, 6, and 7**).

2.3.1 Philosophical and psychological understandings of happiness

Happiness has been a central concept to most ancient philosophies, regardless of their place of origin. Even the stern philosophy of Stoicism has advanced its vision of the ‘stoic’ doctrine of happiness to stress the importance of mastering the control of oneself and achieving inner tranquillity. As Haidt (2006) puts it, as with Buddhists, the Stoics stress the importance of ‘breaking attachments to external things and cultivating an attitude of acceptance’ (p. 82).

One of the classical accounts of happiness as the ultimate purpose of life can be found in Aristotle’s concept of *eudaimonia* (happiness). In *Nicomachean Ethics*, Aristotle (2004) suggests three criteria that must be met to determine what the highest good is: (i) choice worthy for its own sake; (ii) self-sufficient; and (iii) complete without qualification. Happiness meets all three criteria – it is ‘something perfect and self-sufficient, being the end to which our actions are directed’ (ibid., 15), and therefore, is the ultimate goal of human life. Central to the *eudaimonia* theory is the idea of virtue. Aristotle argues that happiness and human flourishing can be achieved through the development and cultivation of virtue (‘virtuous activities’) and that those who seek happiness must act with virtue. This, however, does not mean that pursuing virtuous activities necessarily leads to feelings of happiness and joy (Diener, 1984). Instead, virtue serves as a normative standard of what is desirable. In other words, happiness, in *eudaimonic* terms, is an activity, not an emotional state of the self. Aristotle believes that it is our unique ability to think rationally and to reason that enables us to live in accordance with both moral and intellectual virtues; unlike animals, we have enough control of virtue because we have the capacity to act based on reasoning.

Often placed at the opposite pole of the spectrum to *eudaimonia* is *hedonia*. Aristippus of the Cyrenaic school of philosophy dismissed happiness as the ultimate end and instead advocated ‘particular pleasure’ as the sole good (Irwin, 1991; Waterman, 1993). The Cyrenaics believed that whereas particular pleasures are valued for their own sake, happiness is desirable not for its own sake but because of the particular pleasures. Thomas Hobbes, for one, radically defined happiness as attained through individuals’ preoccupation with fulfilling human appetites and acquiring power (Foisneau, 2014). Although Aristotle agreed with the hedonic understanding of pleasure as an integral part of a good thriving life, he argued that pleasure, per se, shall not be the supreme good nor the goal of human life and that only ‘the masses and

the most vulgar seem – not unreasonably – to believe that the good or happiness is pleasure’ (Aristotle, 2004, p. 8).

Dominant understandings of happiness and well-being changed over time from Aristotle to the Age of Enlightenment and gradually to the Utilitarian philosophy of the 18th century. Two key figures of Utilitarian philosophy are Jeremy Bentham and John Stuart Mill in 18th and 19th century England, both of whom held a hedonistic view of happiness. Bentham introduced the greatest happiness principle; that is, the greatest happiness can be achieved by maximising happiness (pleasure) while minimising pain (misery), and these actions are rational and morally right as long as happiness is considered the only intrinsic good. John Stuart Mill also adopted a hedonistic conception of happiness and argued, ‘[b]y happiness is intended pleasure, and the absence of pain; by unhappiness, pain, and the [de]privation of pleasure’ (Mill, 1969, p. 36). His principles were also based on Bentham’s utilitarianism, but he extended this theory by distinguishing pleasures experienced by human beings; that is, some types of pleasure are supposed to be superior in quality to others. Only those who have experienced pleasures of both sorts (i.e., a ‘competent judge’) could determine the superiority or inferiority of pleasures, and a sensible judgement would prioritise the pleasure of humans (e.g., intellectual pleasure) over that of animals (e.g., bodily pleasure).

Another important feature of *hedonia* is the emphasis placed on the subjective evaluation of one’s happiness. In a broad sense, the idea of self-evaluation of happiness is conceived of as related to the maximisation of positive, happy experiences or feelings, and is largely based on utilitarian principles. It is, however, similarly critiqued that the hedonistic theory adopts a reductionist understanding of happiness construed as ‘a subject’s balance of pleasure over displeasure’ (Haybron, 2000, p. 215). The hedonic tradition of happiness has been taken up by a large group of psychologists over more recent decades, who – in the name of the ‘new science’ of positive psychology – suggested the use of ‘subjective happiness’ and ‘human satisfaction’ as new measures of one’s well-being (Layard, 2005). However, those who are in favour of the *eudaimonic* perspective argued that ‘subjective happiness cannot be equated with well-being’ as some outcomes an individual may value and pursue may not result in their betterment and wellness (Ryan & Deci, 2001, p. 146). This, in turn, led to efforts to broaden the narrow hedonic conceptualisation of happiness (and generally well-being) from the attainment of pleasure to that of more *eudaimonic* elements such as goals, attainment and

values. Such efforts have led to the rise of the notion of ‘subjective well-being’ (hereinafter, SWB) but, as Angner (2010) claims, substantial confusion still remains in regard to what SWB is and how the notion is related to what individuals define as ‘well-being’ – for example, whether SWB should be understood as one of the components of well-being or as the *sole* constituent of well-being (i.e., understanding well-being as a subjective state).

Defining and measuring happiness solely in terms of SWB has also given rise to the problem of reductionism, where a new opposition emerged from scholars such as Goodman et al. (2021), who criticised Diener’s (1984) SWB model comprising of both cognitive (e.g., overall life satisfaction or satisfaction in specific domains of life; cognitive well-being) and affective elements (e.g., frequency of positive and negative emotions). They contend that the understanding of happiness should not be reduced to experiences of positive and negative emotions and vague subjective judgements of their generic satisfaction. Others also problematised the very idea that happiness is defined and measured as a ‘matter of subjective experiences’ and suggested that happiness must be assessed from the outside with a focus on a ‘matter of what one can do or be in one’s life’ (O’Neill, 2006, p. 165). What can be deduced here is that more recent meanings attributed to the notions of happiness and, more generally, well-being are oriented around the idea of *what can be measured*. This belief in scientism of ‘what is measured is treasured’ is nothing new; as explained below, the emerging field of ‘happiness science’ driven by psychologists and economists has established itself as a useful source of evidence-based data for policymaking. Oftentimes, the measures of happiness and SWB and the data they produce are legitimated by their proponents (e.g., policymakers, psychologists) by explicitly aligning themselves with classical philosophical literature, such as *eudaimonia* and *hedonia*, implying that their use of these core terms (i.e., happiness and well-being) correspond to the original thinking of Aristotle and Aristippus.

In response to such concerns, there have been efforts to encompass different philosophical perspectives on the measurement of happiness. In the 2013 *OECD Guidelines on Measuring Subjective Well-being* report, for example, the OECD not only distinguished ‘affective’ dimensions of well-being from ‘*eudaimonic*’ well-being but also acknowledged that:

(t)he evidence base for eudaimonic measures is less clear. While some specific measures – such as those relating to “meaning” and “purpose” clearly capture unique and meaningful information, the picture with respect to eudaimonia as a whole is more ambiguous. This suggests that further work is needed before a definitive position can be taken on the validity of these measures (OECD, 2013b, p. 13)

Equally important but considerably less discussed – with the exception of Rappleye et al. (2020) – is the cross-cultural replicability of such ‘happiness measures’ beyond the Western context. Much of the research on happiness and well-being has long been driven by Western scholars and their conceptualisation of happiness. Christopher and Hickey (2008) argue that the field of positive psychology, in particular, is largely based on Western thoughts and notions such as liberal individualism, demonstrating a partial understanding of ‘what the self is and what the self should be or become’ (p. 566). According to Joshanloo (2014), contemporary Western conceptualisations of happiness and well-being are largely driven by the ideas of positive affectivity and hedonic balance, and embedded in these ideas are the clear boundaries between the ‘self’ and the ‘non-self’.

Such a prioritisation of – or fixation with – the self tends to go against the Eastern (especially East Asian) conceptualisation of happiness and well-being that prioritises harmony and balance over an individual’s life satisfaction. Delle Fave et al. (2016), for example, identify that while individuals in Western countries tend to characterise happiness in terms of positive emotional valence, those in East Asia often characterise happiness as a mix of both positive and negative emotions. Joshanloo’s (2014) comparison of the Western conceptualisation of happiness and a good life with those of the five Eastern schools of thought (Hinduism, Buddhism, Taoism, Confucianism, Sufism) also suggests that the Eastern notions of happiness are often influenced by religious beliefs, incorporating concepts such as ‘self-transcendence’, ‘harmony’, or ‘valuing failure and suffering’. Additionally, Joshanloo argues that the current measures of SWB and happiness are predominantly shaped by Western perspectives emphasising self-enhancement, positive emotions, environmental mastery, and the utilitarian principle of maximising pleasure while minimising pain (e.g., suffering and failure).

The understanding of the role of education in promoting happiness also differs across Western and Eastern philosophical thinkers. For Plato, it is through education people go beyond selfishness and economic self-interest and pursue happiness. Rappleye et al. (2020) argue that Confucianism, on the other hand, advocates the values of hard work, diligence and suppressing one’s selfish desires for the sake of collective prosperity. These differences – not just between the West and the East but also within the Eastern countries, as explained further

below – shed light on the need for a cultural delineation of the notion of ‘happiness’, especially for it to be introduced as a policy signifier. As Rappleye et al. (2020) comment:

...a wealth of previous research has shown how standard yardsticks of happiness developed in the West are not applicable there [East Asia] ... Our research is driven by a deeper concern that left uninterrogated the move to prescribe ‘Happy School’ policies based on these yardsticks may render invisible other avenues to happiness and well-being, alternatives that we surmise will be increasingly important in coming decades... (p. 259)

In other words, an indiscriminate application of Western (often repackaged as ‘global’ or ‘universal’) notions is deeply problematic as it may lead to a misunderstanding, or even ignorance, of local realities within varying cultural contexts.

Bhutan’s philosophy of Gross National Happiness (GNH) is a prime example of the varying Western-Eastern interpretations of ‘happiness’ (see Bates, 2009). Rooted in the philosophy of the country’s state religion, Buddhism, GNH was conceived initially as a ‘specific Bhutanese path to development that would be consistent with Bhutanese values, culture, institutions, and spiritual beliefs’ (Burns, 2011, p. 74). In 1972, the 4th King of Bhutan, King Jigme, declared GNH as an *alternative* economic development paradigm, which challenges the orthodox understanding of development that is driven by the emphasis on materialistic growth (ibid.). King Jigme argued that materialistic growth per se should be not perceived as an end in itself and that ‘living standards’ only consist of one of the nine domains – or means – to achieve the well-being of both the nation and its citizens. Drawing on a Buddhist ethic of life, GNH stresses the internal experience of happiness as opposed to a heavy reliance on external factors of happiness (e.g., material wealth) (Noy, 2008). It posits that the cultivation of the inner ‘self’ leads to a good, ethical, and happy state of mind, which is crucial in creating an interdependent, harmonious, and happy society at large (Tideman, 2011).

There has been, however, a controversial debate in the literature on GNH regarding its link to the hedonistic Utilitarian philosophy. When Bhutan released its *A Vision for Peace, Prosperity and Happiness* report in 1999, the Planning Commission announced its central development concept as the ‘maximization’ of GNH (Planning Commission, 1999, p. 10). While the word ‘gross’ in GNH explicitly hints at a connection with the Utilitarian philosophy, Bates (2009) remains pessimistic towards the connection and argues that the word ‘certainly does not have a meaning corresponding to that in national income accounting’ (p. 1). Similarly, Hirata (2003) argues that, since the GNH’s conception of happiness

encompasses strong moral and spiritual orientations, one needs to take a more prudent approach than labelling ‘happiness’ in GNH as ‘hedonistic happiness’.

On the other hand, more recent literature suggests that GNH may have fallen into a ‘neo-utilitarian corporate objective’ (Chia, 2017). Over the past decade, particularly at the corporate level, GNH has increasingly been aligned with the business agenda of human resource management (Blackman et al., 2010), wherein similar notions, such as well-being and mindfulness, have been adopted as part of a wider and technical strategy of cultivating and managing the quality of human resources. Montes (2020), for example, highlights how the development strategy of GNH, such as ecotourism, functions by exhibiting ‘neoliberal environmentality’, and how this approach is challenged by both formal and informal institutions in Bhutan.

To understand the nature of the term ‘happiness’ in Korea, two Eastern philosophies – Confucianism and Korea’s *Hongik Ingan* principle – require further attention. First, Confucianism is a philosophy that has long played a crucial role in shaping East Asian cultures. While East Asian societies, such as Korea, Japan, Singapore, China, Hong Kong, Taiwan, and Vietnam, all reflected Confucianism in their state apparatus, T. Kim (2009) argues that each society developed its own version of Confucianism. However, the shared value of meritocracy and, hence, the emphases on hard work and harmony remain across these societies until now (ibid.). Scholars such as Liu (2013) and J. Yu (2008) have observed that Confucian ethics share certain similarities in thought with Aristotle’s virtue ethics, although the Aristotelian concept of ‘virtue’ typically focuses on positive and good qualities, whereas the Confucian understanding of virtue (*de*; 德) encompasses both positive *de*, such as compassion and harmony, and negative *de*, such as resentment (Liu, 2013). Another pivotal concept of Confucian virtue ethics is *ren* (仁) (see also, Tan, 2017). The meaning of *ren* can be understood in both specific and broad terms; first, broadly speaking, the term refers to humaneness, benevolence, altruism, and compassion. In a more specific sense, however, its meaning goes beyond an ethical feeling existing in individuals and, as the famous Buddhist monk Daisetsu Teitaro Suzuki (1908) has put it, *ren* becomes the principle that underpins all virtues. It guides one’s day-to-day conduct and any particular modifications arising from this conduct can be understood as practical *ren* activities. In other words, in Confucianism, there is little difference between what it means to live a happy life and what it means to live a good

life (Joshanloo, 2014). That is, promoting harmony is deemed as the ultimate goal of both personal and social life, and to achieve this one must live up to their virtues by constantly developing themselves via learning and cultivating moral and social values (Zhang & Veenhoven, 2008).

Korea's indigenous concept of happiness (linked to the '*Hongik Ingan*') must be reviewed to understand the country's longstanding and distinctive conception of happiness. The *Hongik Ingan* idea is known as the founding spirit of the first Korean Kingdom (*Gojoseon*) in 2333 B.C. and is commonly translated into English as 'benefit the whole community'. The ideals of the philosophy can be found in the historical record of the Three Kingdoms of Korea written by Ilyon in 1281, also known as the *Samguk Yusa* (translated as: "Memorabilia of the Three Kingdoms"). The following is a story of *Dangun Wanggom* (Old Joseon) – also known as the *Dangun* myth – written in the *Samguk yusa*:

In ancient times Hwan-in (Heavenly King, Chesok or Sakrodevendra) had a young son whose name was Hwan-ung...His father, after examining three great mountains, chose Taebaek-san...as a suitable place for this heavenly son **to bring happiness to human beings...**[Hwan-ung] led his ministers of wind, rain and clouds in **teaching the people more than 360 useful arts, including agriculture and medicine, inculcated moral principles and imposed a code of law**

In those days there lived a she-bear and a tigress in the same cave. They prayed to Sin-ung (another name of Hwan-ung) to be blessed with incarnation as human beings. The king took pity on them and gave them each a bunch of mugwort and twenty pieces of garlic, saying **'If you eat this holy food and do not see the sunlight for one hundred days, you will become human beings.'**...**In twenty-one days the bear, who had faithfully observed the king's instructions, became a woman. But the tigress, who had disobeyed remained in her original form.** (Ilyon, 1281; translated by Ha & Mintz, 2006, p. 17-18, my emphasis)

These two paragraphs reveal three core ideals of the *Hongik Ingan*. First is 'bringing happiness to human beings' and the second is the spirit of helping others. Hwan-ung, for example, was assisted by three ministers, the Ministry of Wind, the Minister of Rain, and the Minister of Clouds, in teaching essential knowledge and moral principles to all human beings. The final ideal is about the moral of self-control; the story of the she-bear, who desired to become a human being and was tasked to eat only mugwort and garlic in the cave for 100 days, represents the value of self-control and restraint.

The emphasis on the *Hongik Ingan* idea strengthened as neo-Confucianism became more popular during the Joseon Dynasty (1392-1897); T.-H. Lim (2007) notes that the ideal society envisioned by Confucianism ('Dae-dong society') resembles the ideal society that the *Dangun*

myth pursues. For example, the Confucian idea of the ‘Mandate of Heaven’ (天命) has underpinned the right of political elites to govern and exercise state power, which is well-demonstrated in the relationship between *Hwan-in* and *Hwan-ung* (ibid.). Today, neo-Confucian philosophy continues to play an integral role in shaping individuals’ behaviours and is well-embedded in both legal and education systems in South Korea (Martin et al., 2014).

South Korea adopted *Hongik Ingan* as a core principle of education through the promulgation of the Education Laws in 1949. The Confucian ideal advocates universal and philanthropic values of humanism for the realisation of collective prosperity (Jeong, 2002), showing similarities to utilitarianism (‘collective happiness of all people’). From the economic perspective, however, Jeong (2017) argues that the *Hongik Ingan* idea adopts a more flexible orientation toward liberal and free market principles to bring about the greatest happiness and welfare of the community.

This section demonstrated how different meanings have been attributed to the notion of ‘happiness’ not only across the disciplines of philosophy and psychology but even within the same discipline (e.g., *eudaimonia*, *hedonia*, utilitarianism). As seen in the works of positive psychology (e.g., Joshanloo, 2014), the role culture plays in the conceptualisation of happiness is also substantial. This overview of different meanings and understandings of happiness serves as a useful guide to examine and compare how different actors involved in this study understand and recontextualise ‘happiness’.

2.3.2 The rise of ‘happiness science’

The discourse of happiness re-emerged globally over the past decades with a rise in interest in ‘quantifying’ happiness. One of the largest edited volumes on happiness studies, *the Oxford Handbook of Happiness* (David et al., 2013), proposes that the re-emergence of the study of happiness can be attributed to the nexus of four crucial scientific developments: (i) the rise of the discipline of positive psychology; (ii) the rapid development of biological and affective sciences, with efforts to grasp the nature of positive emotions; (iii) positive organisational scholarship which seeks to nurture the highest level of human potential; and, last but not least, (iv) the ‘beyond-Gross Domestic Product (hereinafter, GDP)’ agenda (ibid., p. 1). The fundamental contribution to the measurement of happiness came from the development and

application of the Likert scale, whereby respondents are asked to specify their level of agreement and disagreement on an ordered scale of emotive labels (e.g., ‘very dissatisfied’, ‘neutral’, or ‘very happy’) in social science disciplines (Frijters et al., 2020), as well as often-controversial propositions that happiness is positively correlated with not only individuals’ successful life outcomes like increased life expectancy and career success (Lyubomirsky et al., 2005), but also social outcomes such as democracy and political participation (Dorn et al., 2007; Frey & Stutzer, 2000).

Some have searched for linkages between the ‘science of happiness’ and the major philosophical traditions (i.e., hedonia, *eudaimonia*, utilitarianism) (Henderson & Knight, 2012; Mountbatten-O’Malley, 2021). Henderson and Knight (2012) argued that both hedonic and *eudaimonic* philosophical traditions have been translated to constitute an integrated concept of *flourishing* which encompasses both hedonic and *eudaimonic* dimensions. Seligman et al. (2004), for example, suggested (i) pleasure (positive emotions), (ii) engagement, and (iii) meaning as three constituents of happiness; that is, pursuing pleasant, good, and meaningful life leads an individual to a ‘full life’. However, there are also others like Mountbatten-O’Malley (2021, p. 20) who raised concerns about many of the recent policy agendas on happiness (or well-being), such as the UK Happiness Index, being led by hedonic notions of happiness and by subjective measures rather than more holistic conceptions of happiness and human flourishing. Suissa (2008) also criticised the lack of discussion on normative philosophical questions of what constitutes a good life or meaning.

The tension between the two camps regarding the understanding of *happiness as a measurable entity* persists. First, driven by the field of positive psychology, the science of happiness discourses has often focused on enhancing life’s positive aspects (e.g., positive emotions or pleasures) over negative emotions and pain. In response to this, critics such as Suissa (2008) argue that these positive psychologists and economists overlook the meaning-makings of both positive and negative emotions in individuals’ lives. For example, any negative emotions (e.g., struggles and pains) could provide meaningful lessons and values to the students throughout their lives, but just by reducing this messy nature of emotions of happiness into quantifiable measures, these lessons tend to get dismissed. Second, as Miller (2008) and R. Smith (2006) have argued, a heavy reliance on ‘objective’ scientific measurements and empirical evidence has ‘[displaced] the exercise of broader judgement and

insight concerning the validity of the underlying concepts and ideas themselves' (Miller, 2008, p. 593).

Also, adding to the earlier concern about the understanding of happiness as a subjective state, the imprecision in the measurement undermines the reliability and validity. As Veenhoven (2012) has put in his analysis of common survey questions on happiness:

Although single questions on happiness seem to measure what they are supposed to measure, they measure it rather imprecisely. When the same question is asked twice in an interview, the responses are not always identical, with correlations of about $+0.70$. Over a period of a week, test-retest reliability drops to circa $+0.605$. Though responses seldom change from 'happy' to 'unhappy', switches between 'very' and 'fairly' are rather common. (p. 335)

While Veenhoven identifies the ambiguity in the response options as one of the possible causes, one may also argue the *problématiques* involved in 'momentary' one-off measurements of happiness. People experience happiness along a continuum, and oftentimes their answers to the survey questions like 'Do you feel happy?' or 'Are you satisfied with your life' could be highly dependent on whatever happened on the day or the day before. Factors such as having a good meal in the morning, a good night's sleep, or exchanging pleasantries with others can significantly influence their responses.

Similar concerns have been expressed about the *problématiques* in the measurement of other 'humanitarian' policy goals. The OECD's attempts to measure global competence, for example, were heavily dependent on *what can be measured*, and its actual assessment failed to 'measure the qualities stated under the official definition, and social skills and attitudes are limited to background information' (Auld & Morris, 2019, p. 693). More recently, the notion of 'creativity' – as a key '21st century skill' – came to the fore of the IOs' education agendas. Accordingly, attempts have been made to measure creativity and creative thinking (e.g., OECD's PISA 2022 Creative Thinking assessment), but these were often limited by a narrow conceptualisation of the term and reliance on easily-measured cognitive skills related to innovation and labour productivity (Grey & Morris, 2022). In other words, despite the increasing inclusion of non-academic outcomes of learning, such as global competence, happiness, and creativity, in the measurement schemata, their partial and narrow measurements of such outcomes tend to conceal how these global actors selectively define these concepts. This thesis, therefore, argues that the polysemic nature of these signifiers and the complexity embedded within these notions are not only reduced but selectively and

strategically articulated in a way that would advance their broader political and economic agendas.

2.3.3 Happiness as a policy signifier

Since the late 2000s, there has been a growing interest, particularly amongst IOs and Global North countries, to promote ‘happiness’ as their overarching national or policy objective, albeit in varying degrees (Binkley, 2014). As will be illustrated in depth in **Chapters 5 and 6**, the rise of the ‘post-GDP discourse’ has effectively shifted both political and scholarly attention from economic-oriented development (measured by traditional economic indicators) to a more holistic vision of development (Cavaliere, 2015). Some of the well-known examples of happiness-oriented policy objectives include – as also illustrated in **Chapter 1** – the passing of the 2012 UN General Assembly Resolution 66/281, which proclaimed 20 March as the International Day of Happiness, as well as the proposals to introduce ‘subjective well-being’ measures in on-going time use surveys (see OECD, 2018a). Such a growing interest in happiness has led to the release of global reports, such as the *World Happiness Report* published by the United Nations Sustainable Development Solutions Networks (UNSDSN) since 2012, and the *Global Happiness Policy Report* published by the Global Happiness Council since 2018. Both UNSDSN and Global Happiness Council are led by globally renowned economists and psychologists, including Jeffrey Sachs, John Helliwell and Richard Layard.

Among the initial assumptions I held at the beginning of this research was that happiness has become a ‘buzzword’ in education policy and that theories of policy convergence-divergence would suffice to explain Korea’s adoption of Happiness Education discourses and its subsequent appropriation and translation at national and subnational levels. This assumption may be supported by world cultural theorists, such as John Meyer, Francisco Ramirez, and John Boli, who contend that national education systems converge over time due to the driving forces of neoliberalism and economic globalisation. These scholars of world culture theory see supranational bodies, such as transnational corporations, intergovernmental organisations and global non-governmental organisations, as leading producers of ‘world culture’ (Boli & Thomas, 1999); that is, different cultures around the world gradually merge into a single world cultural model of education (Griffiths & Arnove, 2015; Meyer & Ramirez, 2000).

Meyer et al. (1997), however, emphasise that world culture itself is highly dynamic and admit that it may involve local processes of enactment and variations. Ramirez (2003, p. 248) explicitly reveals that '(o)ur many references to world models or world blueprints acknowledge that we are not dealing with a singular model free of internal conflict', but simultaneously argues that 'it seems mechanical and misleading to assume that every nation has a distinctive culture of schooling just because no two nations are identical in all school matters'. In other words, world culture theory sees local variations as mere representations of 'loose coupling', that these variations are not products of different goals but simply of varying resources (Ramirez, 2012).

Tröhler (2009) argues that the model of neo-institutionalism emerged from the understanding that 'formal structures of an organization...are a result of adjustment processes' (p. 31); that is, the reason why similar policies emerge across individual nation-states is related to the nature of the world system as a whole, instead of their individual characteristics (Carney et al., 2012). However, the world culture theory simultaneously opens up several theoretical loopholes. First, the theory itself does not sufficiently explain the gap between what world culturalists refer to as the global 'prototype' of education and translated (or hybridised) forms of local implementations. Framing transnational policy borrowing as a driver of education convergence lacks empirical precision; that is, policies are compared relatively generally as if they are outcomes of common challenges and contexts while giving less regard to what Appadurai (1996, p. 18) describes as 'how global facts take local form'. Countries may adopt similar keywords or agendas of education, but it is an empirical fallacy to prematurely conclude that just because some countries are adopting similar education elements, there is a *global convergence of policies*.

That being said, this thesis does not describe Korea's introduction of Happiness Education reform as the outcome of educational convergence, as an increased reference to foreign Happiness Education models and practices does not necessarily serve as 'evidence' of convergence. Even in the earlier policy examples of Japan, Singapore and China (see **Chapter 3**), each of the policies revealed that a range of different meanings was attributed to the umbrella term of student happiness, such as unburdening, flexibility, creativity and problem-solving skills, as well as positive attitudes and values. Steiner-Khamsi (2010, p. 332) also explicitly disagrees with the world culturalists' idea of isomorphism, arguing '[w]hat comes

across as isomorphy is often merely “global speak”, instrumentally invoked at a particular time and in a particular policy context, to accelerate policy change’. As I demonstrated in earlier sections, the concept of happiness does not denote a neutral concept and nor is there one universally agreed-upon condition. It is often disguised under ‘an abstract universalism of trans-nationally disseminated models, rules, and policies’ (Schriewer, 2012, p. 416), which later fans out into new shapes and forms as they interact with country-specific characteristics in the course of implementation.

Second, the world culture theory assumes that national policymakers and politicians would opt for a ‘safe option’ by choosing from ‘guaranteed standardised templates’ –i.e., the most shared aspects, experiences or ideologies of the world culture (see Ramirez, 2012). In so doing, the world culture theory practically dismisses the agency of local actors, given their emphasis on institutional isomorphism and loose coupling (Anderson-Levitt, 2012). As Schulte (2012, p. 475) argues, this shows world culture theory’s ‘inconsequential commitment to social-constructivist perspectives: while subscribing to the constructed social reality, it denies the actors involved their own, particular, constructions of social reality’. Through a three-level analysis (global, national, and subnational levels), this thesis seeks to demonstrate how globally-circulated ideas such as ‘happiness’ are recontextualised across different settings by different education agents.

These theoretical shortcomings show that relying on world culture theory – or explaining Happiness Education as evidence of *global convergence* – may be both naïve and misleading. Although Happiness Education seems like a common goal across countries at a surface level, in reality, it is appropriated, resisted or even rejected as per each society’s needs and priorities, as well as with their respective cultural understanding of the notion of ‘happiness’. As illustrated in depth in **Chapter 3**, the case of Japan demonstrates how the implementation of *yutori* (relaxation) education (e.g., reduction of instruction hours, a new 6-year secondary schooling system) from the late 1990s onwards collided with the country’s political goal of internationalising Japanese education to promote deregulation, individualisation and the liberalisation of education. Eventually, the *yutori* reform met its demise as the country reversed back to the ‘reintroduction of heavy competition through *datsu-yutori* (anti-relaxation) measures’ (Entrich, 2018, p. 277). Also, while the enactments of education policies related to student happiness and well-being reflect the nation-states’ broader concerns

about student *unhappiness* and rigid exam-oriented education systems, whether or not these policies effectively address such issues is questionable. Japan's *yutori* education reform, Singapore's *Teach Less, Learn More*, China's *shuang jian* (double reduction), as well as Korea's Free Semester Initiative (**Chapter 6**) were all met with public concerns that *unburdening* and *freeing* students from academic works would lead to a decline in their scholastic abilities.

The use of happiness as a policy signifier has been much debated and criticised in the critical happiness literature. The emergence of happiness as an education policy signifier demonstrated the permeation of the so-called 'happiness crusade' into the sphere of education, resonating with what Furedi (2004) has described as the political attempts to incorporate notions of emotional management and behaviour into their political talk as 'colonisation of the private world' (p. 171). Similar to Korea's introduction of HEP, both New Labour and Tory politicians in the UK had a sense of bipartisan consensus about the importance of promoting happiness in policies. As individuals' emotions, motivation and generic satisfaction are politicised under the utilitarian principle of the greatest happiness, the boundary between the public and the private sphere becomes blurred.

Hill et al. (2020) also problematised how the idea of happiness is promoted as 'a scientifically backed "ideal" that is achievable by adopting "good" habits, making the "right" choices, and through willpower' (p. 2). They further argued that underneath this promotion of happiness is the implicit norm forced into individuals to pursue pleasure, think and act positively, or distance themselves from suffering. Seligman (2011) similarly argued in his book *Flourish* that orienting well-being and happiness agenda toward individuals' self-reported well-being and happiness may indoctrinate and push people into pressure that they 'must' feel good and better; somewhat resembling Aldous Huxley's 1932 novel *Brave New World* in which the government promotes happiness simply by drugging the population with a euphoriant called 'soma' and, in so doing, forcing people into a normative binary of what is good and bad. Ehrenreich (2009) also in her book *Bright-sided* criticised how the relentless promotion of positive thinking has generated irrational optimism whilst forcing people to conceal their 'negative' thinking, which resulted in self-blaming where feeling 'unhappy' is the individuals' own fault. In other words, by adopting a seemingly humanistic notion of 'happiness' as an education policy signifier, the government may effectively shift the

responsibility and accountability for both academic underperformance and ‘unhappiness’ of students onto the shoulders of schools and the students themselves (Yan, 2022).

As Duncan (2014) rightly pointed out, the term happiness has emerged as an obligatory political and social goal within the emancipatory project of modernity. As stated in the earlier section, one needs to scrutinise how using happiness as a policy signifier serves the interests of the government and how, in so doing, it slides between distinctive, sometimes contradicting directions (ibid.). In what follows in the findings chapters, I draw on this body of literature to demonstrate that the ways in which different policy actors implicate happiness in policy discourses need to be analysed in conjunction with their broader political agendas and ideologies.

2.4 The ‘global turn’ of education

Before exploring the origins and trajectories of ‘happiness’ in OECD’s education initiatives in **Chapter 5**, it is imperative to understand the role and capacity of the OECD in influencing global education discourses and their governance approach. In this section, I draw on international relations (IR) literature to discuss the role of international organisations in global educational governance. This is then followed by the discussion of implications, particularly on the shifting role of the nation-state from a traditional autonomous agent of education policymaking to states as social entities (Finnemore, 1993).

2.4.1 The role of International Organisation (IO) in global governance

Over more than half a century since the founding of major international organisations (IOs), the scholarship on IOs has been dominated by traditional state-centric realist theories (Finnemore, 1993; Ozkan & Cetin, 2016). Realists believe that there is no greater or more influential authority than nation-states themselves because they are not only unitary but also rational actors (Ozkan & Cetin, 2016). The understanding of nation-states as rational actors derives from influential realists such as Hans Morgenthau (1985), who contended that nation-states always strive to shake off the restraints that external influence (e.g., international law) might place on their governance and that international laws only matter on the occasion that suits their national interests. As realists believe in the self-interested nature of nation-states,

they see IOs as having little independent influence over nation-states and their role as ‘merely providing a better framework for diplomacy by improving the means for negotiation among states’ (S. Park, 2018, p. 20). Hence, from the realist point of view, IOs and the force they exercise are viewed as *constraints* to nation-states’ governance, or as Martin and Simmons (2002) have stated, are ‘epiphenomenal to state power and interests’ (p. 329). It also explains that IOs exist to tackle the issues of high transaction costs and incomplete information (Barnett & Finnemore, 1999). Even on the rare occasions when the agency and authority of IOs in rule-making were examined, the realists questioned the validity of treating IOs (or other transnational agencies) as independent actors, arguing that the political significance of IOs’ activities has largely been driven and maintained by the states with dominant (economic) powers (Gilpin, 1971, p. 413).

From the 1950s onwards, another theoretical perspective of realism, also known as ‘neo-realism’, slowly emerged to take a more scientific approach to understanding the behaviour of nation-states. Unlike classical realists like Morgenthau, neo-realists such as Kenneth Waltz showed little interest in the role of human nature but in ‘how the structure of the international system influences the behavior of states’ (Joseph, 2015). From their point of view, IOs are still seen as instruments of state agency and interests; that is, powerful nation-states, i.e., hegemons, establish IOs to advance their own political and economic interests, whereas weaker nation-states use them ‘to **balance** against the hegemon or to bandwagon with it’ (S. Park, 2018, p. 21, original emphasis).

From the 1980s, neoliberal institutionalists advanced beyond the state-centric approach of the realist school of thought, taking a step further by adopting a similar ontology that positioned the nation-state as the singular significant actor (Nielson & Tierney, 2003). Two major differences between realists and neoliberal institutionalists are their understanding of (i) the role of information, and (ii) the interest of nation-states. While the former believes the information to be scarce and unreliable, neoliberal institutionalists argue that IOs play an important role in collecting and disseminating more and better information (e.g., information about what other countries are doing or will do; information about the situation) which not only reduces transaction costs but also facilitates cooperation and competition between nation-states (Jervis, 1999). Also, whereas (neo)realists assume that nation-states act to maximise their ‘relative’ gains against other nation-states, neoliberal institutionalists assume

that nation-states act to maximise their ‘absolute’ advantage regardless of the performance of others (Paterson, 1996, p. 69). Neoliberal institutionalists such as Robert Keohane (1989, p. 13) argued – with reference to the European Community and the UN Security Council – the pervasive role of IOs in world politics, wherein new sets of rules and norms are defined and established through which IOs demonstrate the potential to facilitate international cooperation.

Both (neo)realists and neoliberal institutionalists, however, overlooked the interests and actions of IOs themselves (S. Park, 2018, p. 26). The constructivist school of thought criticises both realism and neoliberalism by arguing that both traditions have no theoretical apparatus to examine the behaviour and agency of the IOs. It problematises the ways in which the functionalistic accounts about the role of IOs incorrectly portray IOs as *passive* agencies that merely ‘do what states want’ (Barnett & Finnemore, 2004; Nielson & Tierney, 2003). Instead, the constructivists highlight the inefficient behaviours of the IOs as dysfunctional or even pathological (Nielson & Tierney, 2003). The causes of such undesirable behaviours, according to Barnett and Finnemore (2004, p. 3), come from the fact that they are bureaucracies themselves with ‘own internal logic and behavioural proclivities’. Having the ability to make their own rules gives them the power to regulate, or even constitute, their own social world, through which they create new actors as well as new ‘shared’ tasks and promises (ibid.). These characteristics of bureaucracies ontologically separate IOs as independent actors.

All three schools of thought – (neo)realism, neoliberalism, and constructivism – offer explanations of the OECD’s changing role in education policymaking. Li (2021) examined these schools of thought in detail using a periodisation consisting of (1) cold war politics (1950-90s); (ii) neoliberal globalisation (1990s-2010); and (iii) sustainable development goals (2011-2030). Li argues that the realist perspective explains how the OECD operated under the interests of the dominant state powers (i.e., the U.S. leadership) during the cold war period, whereas the neoliberal perspectives drove the OECD’s ‘comparative turn’ with a stronger focus on measuring outcomes and performance and, lastly, the constructivist perspective for understanding the OECD’s role in disseminating their own missions and education initiatives (e.g., PISA, PISA for Development) and legitimating their political agency to shape national policies and structures.

In the coming chapter (**Chapter 5**), it becomes evident that the constructivist tradition best explains why the concepts of happiness and well-being emerged in the global education policy discourses. The section below substantiates this constructivist perspective by discussing the different mechanisms IOs – specifically the OECD – use to legitimate their authority in education policymaking.

2.4.2 IOs as education policy actors

Framed by globalisation and the neoliberal paradigm, the education governance of individual nation-states in the implementation of education policy has been driven and also restrained by global actors, such as IOs and transnational corporations. One prevailing view is that the de-territorialisation of traditional state-driven education policymaking and networks can be attributed to the emergence of a *global policy agora* as Stone (2008) termed it. The goals of policymaking are no longer bound to national and local boundaries but have rather diversified and are expected to meet the globally discussed and shared objectives (Stone, 2019), such as the UN Millennium Development Goals and SDGs. One of the drivers behind this trend is the use of ‘comparison’ as a mode of governance (see Nóvoa & Yariv-Marshall, 2003; T. Kim, 2014). In turn, education now, more than ever, encompasses a global orientation at various levels, not just discursively on policy documents but substantively through, for example, the introduction of new curricula such as GCE (Mannion et al., 2011).

While there has been a plethora of studies examining the roles IOs – and more recently transnational corporations – play as policy actors (Barnett & Finnemore, 1999; Brosig, 2011; Finnemore, 1993; Finnemore & Sikkink, 1998; Lawn & Grek, 2012), till recently, there have been few studies that focus in-depth on the specific mechanisms these agencies use to govern education (Auld & Morris, 2021; Zapp, 2021; Li & Morris, 2022). Zapp (2021) distinguishes two categories of influence mechanisms employed by the IOs: (i) hard or *coercive* mechanisms; and (ii) soft or *normative* mechanisms. Traditionally, the scholarship on IOs focused on the first category as an enforcement mechanism. Coercive mechanisms, according to Appuhami et al. (2011), operate in the forms of financial or moral authority, economic sanctions or information monopolisation. Robertson (2006), for example, examined the World Trade Organisation’s General Agreement on Trade in Services which incorporated public services such as education into their mandate, conceptualising education as a ‘tradable’ commodity.

Soft (or normative) mechanisms, on the other hand, are increasingly employed by IOs that are in the absence of any binding or coercive enforcement mechanisms, most notably the OECD (Niemann & Martens, 2018). Scholars such as Grek (2009), Ozga (2008), and Ball (2018) have focused on IOs' greater propensity to employ soft law or *governance by numbers* to enable the exercise of governance at a distance. Central to these soft mechanisms has been the recognition of the IOs' technocratic expertise and their role as *knowledge producers* (for OECD, see Bloem, 2015; for World Bank, see Zapp, 2017). In more recent years, however, Grek (2020, p. 191) stressed that OECD has gone beyond their earlier role as a 'technocratic power' with technical expertise and has rather embraced a role of a *knowledge broker* that not only provides forums where both policy actors and scientific experts can interact and exchange but also actively translate and interpret the knowledge it produces followed by a series of policy recommendations.

It is not just the numbers that give legitimacy to push forward national or international agenda into or across the boundaries of nation-states, but also how an agenda gets framed and then goes unchallenged should it gain political popularity. To frame is to consciously construct some aspects of reality in a manner desired in such a way that involves selection (e.g., inclusion and exclusion), interpretation and representation (Entman, 1993; Hallahan, 1999). Hallahan (1999, p. 207) describes how this process can be understood metaphorically as a 'window frame', in which the intended receivers of the message are presented with a delimited picture of reality. Setting aside the question of what the effects of framing are on receivers' cognitive schemata, there remain to be addressed why and in what ways frames are used and for how long they can be sustained.

The frames that the IOs use to promote their own mission involve the process of defining and calling attention to certain problems while obscuring others (Coleman et al., 2011; Entman, 1993). The post-GDP frame, for example, served as a means to call for greater attention on well-being in the late 2000s, although it would be more accurate to speak of the faults of GDP as *problematizations* instead of *problems* to 'emphasise that problems acquire their shape and meaning through discursive processes' (Barbehön et al., 2015, p. 246). The extant literature on IOs' legitimacy-building strategies has examined how supranational agencies frame particular agendas and implement them without fierce opposition (e.g., Baumgartner & Mahoney, 2008; Serrano-Velarde, 2015), whereby many noted that framing strategies are

particularly favoured by actors with no enforcement mechanisms. Serrano-Velarde (2015) examined how EU policymakers overcame their previously limited political influence over education and research and expanded their jurisdiction to the field of higher education. They identified how the European Commission followed a couple of well-defined policy frames, such as the ‘knowledge economy’, advocated by the 2000 Lisbon Agenda and, in so doing, effectively increased their visibility at the regional level and promoted a range of higher education agendas without evoking strong opposition. How problems are framed and the ways forward are discussed can therefore be seen as a materialisation of specific interests and agencies, and neither the agenda nor how political issues are defined and presented is external to political conflicts (Daviter, 2007).

Given the ‘waning’ national interest in ILSAs (Jerrim, 2023), which Sorensen et al. (2021) dubbed as the ‘PISA-fatigue’, it is likely that framing strategies, particularly those embodying humanistic and promissory connotations, are preferred by IOs, especially the OECD and the UNESCO, to influence education governance.

2.5 National and local responses to ‘travelling’ policies

The reasons for borrowing or referencing a policy from another system are complex and, as Burdett and O’Donnell (2016) put it, are very much embedded in the context of the referencing society. Drawing from Niklas Luhmann’s systems theory, Schriewer (1990, 2003) uses the concept of externalisation to argue that countries make deliberate references to foreign examples to create legitimacy for introducing certain reforms. Waldow et al. (2014) offer a good example of varying interpretations of the success of the Asian Tigers in PISA in Germany, Australia and South Korea, which served as a ‘source’ to legitimise either the status quo or the introduction of new reforms. Schriewer and Martinez (2004, p. 32) further argue that when countries make external points of reference, they “‘filter” the reception and description of an international environment according to the changing problem configurations and reflection situations internal to a given system’; in other words, it is the idiosyncrasies or the *socio-logics* of the internal system (e.g., motivations of state-level actors) that produce different translations of the same imported policy (Schriewer, 2014; Steiner-Khamsi, 2014).

It should also be noted that domestic policy actors search for convincing external evidence that validates their desired policy directions, where the chosen evidence is evaluated ‘subject to the observers’ own socio-cultural frames of reference, concerns for self-assertion, and vital group interests’ (Schriewer, 2014, p. 89). In a similar vein, many scholars argue that external evidence, such as the two major ILSAs like PISA and TIMSS, is widely harnessed by national policymakers, often in a selective, or even distorted, manner. P. Morris (2012), for example, points out how sources of evidence were selectively chosen and distorted in England’s 2010 White Paper in order to project their own desired agendas. Others such as Rappleye et al. (2011) and Peck and Theodore (2010, p. 170) argue that global scripts become increasingly fractured as they enter the national boundaries as they ‘...rarely travel as complete “packages”, [but] they move in bits and pieces...’. Such domesticated education reforms are rarely ‘replicas’ of practices introduced elsewhere but are selectively chosen and appropriated under the various complexities happening inside nation-states. Turner (2020, p. 304) similarly points out that ‘what gets discussed, and when, depends more on the policy needs of the country doing the projecting than on either PISA results or anything that actually happens in the reference country’. Burdett and O’Donnell (2016, p. 113) suggest that the reasons for these lost-in-translation moments range from referencing society’s ‘naivety of aspirations’ to more deliberate misrepresentations. Therefore, more critical attention needs to be given to the role of domestic politics in determining which ‘best practice elsewhere’ to borrow and why; that is, borrowing may occur at a particular moment not because it is simply a *good* policy or practice but because as it has a ‘salutary effect on domestic policy conflict’ (Steiner-Khamsi et al., 2006, p. 248).

What is relatively less explored is the role nation-states’ sociotechnical imaginaries (STIs) play in determining which evidence will be presented and how. As briefly explained in **Chapter 1**, STIs are ‘collectively held, institutionally stabilized, and publicly performed visions of desirable futures’ (Jasanoff & Kim, 2015, p. 19). Earlier literature on STIs was limited to examining the role nation-states and governmental actors play in incorporating their imaginaries into the country’s technology development projects (Jasanoff & Kim, 2009). Such a narrow focus on state actors, however, has been problematised in more recent years, and a call has been made to pay attention to the ‘boundedness’ of the imaginaries, particularly to how the STIs become grounded not just in political and economic contexts but also in local and cultural contexts (e.g., class divisions) (Smith & Tidwell, 2016). This has led to a

considerable expansion of the spectrum of key agents including, but not limited to, corporations (E. Smith, 2015), social activists (S.-H. Kim, 2015), international organisations (Berten & Kranke, 2022), and even to non-human ‘technological actants’ such as data (Mladenović et al., 2020).

Although not specific to STIs, similar arguments about the cultural embeddedness of policy transfer and borrowing and the role of the agency have emerged in the field of comparative education over the past two decades. Scholars such as Nóvoa (2018, p. 553) criticised how comparative education, as a field, contributes to a ‘homogenised view of education, which draws on the examples, images, and models of the “Anglo-Saxon North”’, instead of recognising and illuminating the different spatialities and temporalities that ‘coexist [even] in the same space ... [and] at the same time’ (p. 556). Unlike the world culturalists who identify the convergence of school systems and cultures into a single unified global model of education, cultural anthropologists, such as Anderson-Levitt (2003) and Schulte (2018), highlight the divergences caused by different institutional and cultural settings among national school systems. Their focus lies on understanding why meanings involved in certain ‘global projects’ (e.g., competency-based approach) tend to be cross-nationally and internationally inconsistent (Anderson-Levitt, 2017). Anderson-Levitt and Gardinier (2021), for example, highlighted the polysemous nature of ‘competency’ at the global level and how, once translated and enacted into national policies, a competency-based reform unfolds into different variations, each of which aligning with national needs and local culture.

To unpack the different realities, many focused on local communities, e.g., teachers, students, and school curriculum, as their locus of study, either exploring micro-level tensions inherent in implementing borrowed policies or examining how the same policy can have very different outcomes across, or even within, countries. Scholars such as Anderson-Levitt (2003, 2012) and Beech (2011) stress the need to adopt a new theoretical perspective that accounts for how subnational actors translate or appropriate educational policy, often consistent with their existing institutional and cultural settings. While ‘methodological nationalisation’ has widely been criticised in comparative education research (Dale, 2005), this largely brought a shift of attention only from the focus of the nation-state to the changing global-national relationship while giving less attention to the presence and role of subnational (e.g., school, local, and provincial) levels in shaping education systems and practices (Guevara, 2022).

These perspectives are indeed useful for this thesis to understand the sub-national level interpretation and translation of ‘happiness’ and ‘Happiness Education’ into school-level practices; however, these studies – Anderson-Levitt (2003)’s edited volume *Local Meanings, Global Schooling*, in particular – remain heavily focused on the oversimplified nexus of the global-local. Despite their attempts to push away from methodological nationalism, in which the nation-state is taken as the primary unit of analysis, Vandegrift (2005, p. 71) criticises cultural anthropologists’ reliance on local perspectives that tends to result in ‘scant attention to questions of power’. A similar concern has also been raised by Steiner-Khamisi (2012, p. 467) that they largely overlook the issues of power, legitimacy and the role of politics. To overcome these limitations, this thesis explicates how global, national and school-level actors individually and collectively exercise their agencies and how these agencies are ‘exerted continuously at all points between the three main levels’ (Vidovich, 2004, p. 343).

2.6 Conclusion

What this thesis hopes to argue from the sections above is that both cross-national policy transfer and the subsequent local translations of policy ideas and ‘signifiers’ should be understood as an act of assemblage – or what Robertson and Dale (2015) describe as the ‘education ensemble’: a particular social reality comprising of multiple determinations and ‘layers of structures and generative mechanisms’ (Joseph, 2000, p. 186). The concept of education ensemble reflects the importance of bringing elements of culture, politics, and economy together and, in so doing, attending to the complex interplay of the structures, institutions, and relations within the society. Robertson and Dale (2015) argue that oftentimes particular elements of the ensemble (e.g., culture) are left out from the dominant accounts of the globalisation of education. This understanding of the education ensemble provides a constructive perspective in a project such as this, which delves into understanding why a phenomenon is interpreted in a particular manner. It sees a particular phenomenon as a ‘project’, rather than an exogenous or accidental course of events (M. J. Kim, 2022).

Chapter 3 The rise of 'Happiness Education' in East Asia

3.1 Introduction

Drawing on policy examples from four East Asian societies (Japan, Singapore, China, and Hong Kong), this chapter reviews their major education reforms and explores the commonalities and differences across the reforms. While East Asian societies have shown strong student performance in cognitive achievement tests (e.g., OECD PISA, TIMSS), many of them suffer from high levels of stress and teenage suicide. Attempts to explain the causes behind East Asian students' low levels of happiness, mental health, life satisfaction, and well-being have led to an identification of a range of 'common' explanatory factors, which include, but are not limited to, historical, economic, and sociocultural factors, such as the rapid economic growth, the Confucian tradition, and colonial experience (Yee, 1989; F. K. Leung, 2002; Rappleye & Komatsu, 2020). The purpose of this chapter is not about identifying the decisive factors behind low student happiness, but about examining the role which the promotion of student happiness and well-being played in the major education reforms of the four East Asian societies.¹ In so doing, this chapter relates to the overall thesis by demonstrating that 'Happiness Education' emerged as a policy phenomenon not just in Korea (**Chapter 6**), but across many East Asian societies.

This chapter reveals that, despite the *seemingly* converging policy goals, each policy reform is underpinned by a distinctive interpretation of student happiness (e.g., 'unburdening', whole-person development, creativity, civic education, and 'patriotic' citizens), as well as in the approach of how these goals can be achieved. It argues that the 'convergence' argument may only be feasible if one compares these 'polic[ies] at a singular point of time after its implementation' (Bamberger & Kim, 2022, p. 15); however, even in such cases, similarities tend to be more discursive than substantive, and even such comparison would ignore the contestations and complexities embedded in both the policymaking and practice of each society. Instead, the chapter highlights the importance of heeding both the latent objectives behind each reform and the varying – and continuously changing – historical, political,

¹ Taiwan was excluded from the policy review as Taiwan has not introduced any large-scale education reform to tackle student unhappiness to this date.

economic, and social contexts and how these result in a gradual shift of the focus of each reform over time.

3.2 East Asian countries: Analogous but not homologous

This section provides an overview of how the phenomenon of ‘happiness’ has manifested in East Asian societies – most notably: Japan, Singapore, China, and Hong Kong. It provides a detailed trajectory of how and why the meanings associated with ‘happiness’ emerged as education policy signifiers in each society. This section hence opens up a discussion on whether the policies that emerged in these societies signal a sign of ‘convergence’ of ‘Happiness Education’.

3.2.1 Japan: From *yutori* to the promotion of ‘ideal citizens’

A form of ‘Happiness Education’ reform first emerged in Japan when the Central Council for Education – the permanent advisory council in the Ministry of Education, Culture, Sports, Science and Technology (MEXT) – released *The Model for Japanese Education from the Perspective of the Twenty-first Century* report in 1996. This report was arguably the first ‘internal’ movement within the MEXT to make an extensive shift away from the traditional standardised and competition-oriented rote-learning system to the cultivation of interest, attitude, and motivation and an emphasis on the vision of ‘Zest for Living (*ikiru chikara*)’ (Rappleye, 2012b). The report was then followed by an interim report titled, *To Cultivate Children’s Sound Minds that Develop a New Era* in 1998 (Central Council for Education, 1998). Throughout the report, the Council stresses the development of children’s ‘sound minds’ and ‘rich sense of humanity (*yutakana ningensei*)’ and urged the importance of cultivating children’s ability (i.e., the ability to identify problems, to act independently, to make judgements), positivity (i.e., ‘positive cooperation’, ‘positively participate’), behaviour (i.e., ‘correct children’s misbehaviour/egoistic/problematic behaviour’, tolerance), and sound development (i.e., mental development, good human relations, consideration for others, fullest confidence) (ibid.).

In the 2002 White Paper *Japanese Government Policies in Education, Culture, Sports, Science and Technology 2002*, the MEXT (2002, Chapter 3 Section 1.2) further justifies this

new policy objective of cultivating a ‘rich sense of humanity’. Some of the policy rationales the White Paper offers include: (i) children’s increased access to information-communication equipment (e.g., cellular phones, personal computers, TV, compute games) and various social problems caused by their misuse of such equipment; (ii) growing problems of violence, bullying and non-attendance at schools; and (iii) children having lower self-esteem and confidence compared to those in the United States and China. It is against this background that MEXT reoriented the role of school to ‘nurture the minds of children’ (ibid., Chapter 3 Section 3.1). This led to the active promotion of both Moral Education and ‘Emotional Education’, through specific initiatives such as the distribution of ‘mind notes’ (*kokoro no note*) and ‘teachers of the mind’ (*kokoro no sensi*) and the provision of hands-on nature-oriented activities in subject classes.

But more broadly, the MEXT introduced a nationwide curricular reform in 2002 titled ‘relaxed education’ (or pressure-free education; *yutori kyoiku*). The *yutori* reform sought to (i) decrease students’ academic burden by reducing schooling days and hours (e.g., from a 6-day school week to a 5-day school week; cutting instruction hours in traditional subjects); and (ii) take a constructivist curricular approach with the introduction of a new subject called ‘Integrated Studies’ (*sogo gakushu*) where students can develop their interest, creativity, and problem-solving skills through project-based learning with flexibility given to schools with regard to the length and topics of the subject (Takayama, 2010). While the reports and the White Paper do not explicitly employ the terms ‘happiness’ or ‘well-being’, the cultural meanings generally attributed to the term *yutori* in non-educational settings reveal its focus on ‘a state of psychological well-being and positive perspective’ (Yamashita et al., 2001, p. 225). While the instruction hours of not only the core school subjects, such as the Japanese language, Social studies, Mathematics, and Science, but also the non-academic subjects (e.g., Art, Music, and Physical Education) decreased sharply, only that of the Moral Education subject remained unchanged (see Entrich, 2018, p. 282).

The *yutori* reform was soon criticised for declining Japanese students’ academic achievement and was even blamed for ‘put[ting] the nation at risk’ (Takayama, 2007, p. 424). Particularly significant was the drop in the country’s PISA ranking in comparison to the pre-*yutori* era. Rappleye (2012b, p. 195) highlighted that the results of the PISA 2003 ‘suddenly reignited the sense of crisis: Japan had slipped from 6th to 14th place in reading skills with slides in

mathematics and science as well'. Following a sharp decline in Japanese students' literacy performance in the PISA, in 2005, MEXT introduced a set of measures to improve students' literacy, such as the Reading Comprehension Improve Programme (MEXT, 2005), which emphasised the importance of cultivating interpretation, reflection, and critical reading skills, encouraging students to read a wider range of texts and materials, and 'aligning' both the country's national language curriculum and the nation-wide academic achievement testing with the PISA model (Ohagi, 2022; Takayama, 2018). Unsurprisingly, Japan's reading performance in PISA made a significant improvement in PISA 2009 and 2012 (OECD, n.d.). It is, however, worth noting that those who sat for PISA 2003 or 2006 were not the students who were educated under the 2002 *yutori* curriculum; instead, the first time the *yutori* generation partook in PISA was in or after 2009 (Kitamura et al., 2022, p. 153). In other words, the argument that the *yutori* caused the falling scholastic ability of students cannot be justified.

In addition to the concerns about the sharp decline in students' scholastic abilities, the meanings associated with '*yutori*' were gradually linked with another major objective of MEXT: the 'internationalisation (*kokusaika*)' of Japanese education (Entrich, 2018). Not only did the objective of internationalisation provided the opportunity for the government to reintroduce the idea of 'competition' into the country's education system, which is seemingly contradictory to the idea of 'relaxation', but the MEXT's promotion of both English and Japanese language education in the early 2000s was also framed as a means through which the country preserves its national cultural identity (Phan, 2013, p. 166). This resonates with what Vickers (2018, p. 1) described as 'profound confusion over what "internationalisation" means' in Japan. That is, whilst the objective to internationalise Japanese education reveals the government's broader – but also narrow vis-à-vis the Anglophone approach to 'internationalisation' – ambition to elevate the international standing of its universities and to prepare graduates for global markets, its 'internationalisation-through-English' discourse inherently 'reinforces stereotyped images of Japan as a society characterized by a cultural "purity" that needs defending against the malign forces of Anglo-Saxon global hegemony' (ibid., p. 5). This resonates with the way Korea instrumentalised 'internationalisation' initially with a 'memetic desire to stand side by side with the "global club"' (Bamberger & Kim, 2022, p. 9), and later as 'indicators of legitimacy, quality and economic success' (ibid., p. 13).

Despite the *yutori* reform's attempt to reduce the intense competition between students and the pressure on them, the critique of the reform eventually resulted in another round of curriculum guide revision from 2008 with a range of anti-relaxation (*datsu yutori kyōiku*) measures (Mawer, 2015). These measures included (re)increasing the number of instruction hours at both primary and lower-secondary schools by 10%, an increase in the teaching content, expansion of math and science education, as well as the reduced instruction hours for Integrated Studies. The sentiment continued even in the 2017 revision, where the number of instruction hours in primary schools was further increased. What was also increasingly evident in this series of revisions was a shift away from the focus on 'relaxing' the students towards the promotion of the 'ideal' citizen through Moral Education (MEXT, 2008). The nationalistic agenda of Japan's conservative Liberal Democratic Party and its coalition partner New Komeito led to an emphasis on patriotism as an explicit educational aim (Bamkin, 2018), wherein Moral Education was promoted as a 'special subject' through which the country aims to cultivate 'ideal' citizens who were not only patriotic, modest, and exercised self-restraint, but also are equipped with an international outlook and a global mindset so that they can 'contribute to world peace and human welfare' (MEXT, 2008, p. 1). The same rationale behind the earlier *yutori* reform, such as tackling school bullying and high student suicide rates, was also repeated in the subsequent policy documents on Moral Education (Nishino, 2017).

Komatsu et al. (2022) identify the potential shift in the understanding of 'happiness' in Japanese society. Here the term *yutori* (relaxation) is replaced with the term *satori* (sudden enlightenment), which represents the state of *zen* (a state of calm through self-control and relaxation). The authors argue that Japan's youth generation – the *satori* (*yutori*) generation – shows lower interest in materialistic desires or individual achievements in comparison with previous generations. To what extent such a shift in the conception of happiness would impact the futuristic vision of Japanese education is yet unclear, although Yamanaka and Suzuki (2020) have recently hinted that the new National Curriculum Standards implemented between 2020 and 2022 continue to resonate with the values and qualities proposed in the 1990s Central Council for Education reports, most notably: 'the sense of humanity', 'independent thinking and judgement', 'interactive in-depth, active learning', and many more.

What is notable in the case of Japan is that, despite the rise of ‘happiness’ and ‘freedom’ discourses in the Japanese education reform in response to social issues of youth delinquency, high student stress and suicide rates, both *yutori* and post-*yutori* reforms were a mesh of a variety of disparate initiatives, such as reducing (and later increasing) the subject content, instructional hours, and homework, as well as building national and cultural identity through ‘internationalisation’ of education. It can be argued that these reforms were the outcome of colliding interests between different education stakeholders, as Cave (2007, p. 14) argued:

...the Right wanted more stress on patriotism, ‘Japanese tradition’, and moral education; business leaders wanted more emphasis on creativity; teachers’ unions wanted smaller class sizes and more resources; and some on the Left wanted the opportunity of high school education for all and the end of high school entrance exams.

However, as is further demonstrated below, unlike Singapore or Hong Kong, Japan’s objective of fostering ethnocentric nationalism and patriotism was not initially explicitly expressed in the earlier *yutori* reform documents. It was with the rise of concerns related to globalisation coupled with a mesh of colliding political and economic interests between different education stakeholders that its focus gradually shifted away from students’ happiness and freedom towards preparing students today for the ‘uncertain’ future. It can, therefore, be argued that the notion of *yutori* was used as a floating policy signifier to harness Japan’s different political and economic objectives, such as internationalisation, patriotism, creativity, gradually deviating from its earlier policy emphasis on relaxation and psychological well-being.

3.2.2 Singapore: From holistic development to Social and Emotional Competencies

The section explores how Singapore introduced specific policy initiatives related to student happiness and well-being as part of its major education reforms. Since its independence from Britain in 1963, Singapore has undergone broadly three different phases of education reform: (i) the survival-driven phase (1965-1978); (ii) the efficiency-driven phase (1978-1997); and (iii) the ability-driven phase (1997-present) (Tan & Dimmock, 2014). The first ‘survival-driven’ phase was driven by the country’s urgent need to build its economy. While the government already made a six-year course of primary education freely available for all school-age children, Singapore suffered from low levels of basic literacy and numeracy with insufficient infrastructure to handle the rapidly increasing number of pupil enrolment (Wong, 1991). Accordingly, the focus of education policies in the 1960s through the 1970s was on

improving levels of basic literacy and numeracy by building more schools and expanding the school workforce. By the late 1970s, Singapore's concerns and anxieties shifted towards achieving a structural transformation of its economy. To embark on a transition from a labour-intensive to a capital-based economy, the government emphasised enhancing the quality of education, 'streaming' students according to their knowledge and ability, and designated English as the language of instruction in 1987 (ibid., p. 133). However, by the mid-1990s, Singapore increasingly realised that its 'education system was failing to bridge the gap between academic and non-academic social skills to remain a competitive force in the global economy' (Rajandiran, 2021, p. 61), and against that background emerged the final 'ability-driven' phase since 1997 onwards.

Underpinning the 'ability-driven' phase was the belief that individuals need to be prepared for the uncertainties of the 21st century. In his famous speech, Prime Minister Goh (1997, pp. 7-8) made the following remarks:

Every organisation ... must require that its employees go through **regular learning as a routine part of working life**. Every worker must be mobilised to think actively about how he can do better in his job.

We will bring about a mindset change among Singaporeans. We must get away from the idea that it is only the people at the top who should be thinking, and the job of everyone else is to do as told. Instead we want to bring **about a spirit of innovation, of learning by doing, of everyone each at his own level all the time asking how he can do his job better**.

With such an approach ... we will achieve our ambition of **national excellence**. Excellence does not simply mean "outstanding": excellence means each of us at our own level, being the best that we can be.

We want to have an environment **where workers and students are all the time thinking of how to improve**. Such a **national attitude** is a must for Singapore to sustain its prosperity. TSLN is not a slogan for the Ministry of Education. It is a formula to enable Singapore to compete and stay ahead. (my emphasis)

What is notable in the excerpt above is the description of the mindset of a lifelong learner as a 'national attitude' and a key to achieving 'national excellence'. Accordingly, the Singaporean education system was gradually aligned with the emphasis on 21st century skills, such as the development of problem-solving, critical and creative thinking, as well as Information Technology skills for the knowledge economy.

Also, the social concerns towards rigid textbook- and teacher-oriented approaches in the classroom and students' aversion to learning were increasingly notable in the late 1990s. To

tackle these issues, two key developments were undertaken accordingly: (i) the introduction of Thinking Schools, Learning Nation (TSLN) as the vision of Singaporean education by then Prime Minister Goh Chok Tong in 1997; and (ii) the launching of Teach Less, Learn More (TLLM) framework in 2005. First, through TSLN, the MOE devolved to some extent of its autonomy and decision-making responsibilities to the school level and sought to offer more school programmes and subject choices, such as the Integrated Programme scheme, to students to ensure greater diversity and develop excellence (Tan, 2008). The TSLN initiative, however, went beyond conferring more freedom and autonomy on schools, teachers, and students. As illustrated in the two *The Straits Times* news excerpts below (Figure 3.1), the TSLN initiative also stressed ensuring students remain ‘rooted’ in the country and cultivating their lifelong enthusiasm for learning as well as nationalistic commitment (see also Tan, 2006).

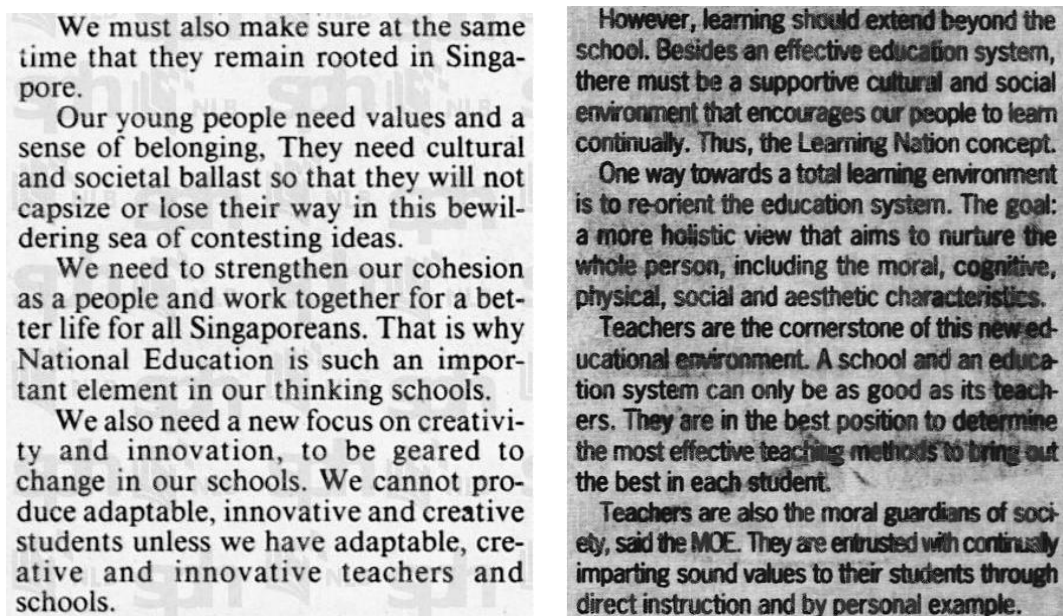


Figure 3.1. *The Straits Times* news excerpts in 1997 and 1998

Sources: *The Straits Times*, 3 August 1997 (left) & 15 February 1998 (right)

This objective led to the launch of National Education in 1997, a cross-curricular approach that emphasises ‘giv[ing] school children a “well-founded faith” in Singapore’s future’ (Han, 1998, p. 93), fostering pride in being Singaporean, teaching them the history and challenges of the country, and ‘instilling’ in students ‘core values’ that would ensure the country’s prosperity and well-being (Ministry of Information and the Arts, 1997). The role of teachers was also redefined as ‘the moral guardians of society’ (*The Straits Times*, 1998, n.p), in

tandem with a newly assigned responsibility to ‘[impart] sound values to their students through direct instruction and by personal example’ (*The Straits Times*, 1998, n.p).

Koh (2013) argues the TSLN vision as ‘an example of Singapore’s national imaginary embodied as an educational imagination’ (p. 52); that is, its overall aim is ‘to reproduce subject-citizens who have the “right” skills to go “global” yet with their hearts rooted to “local”/“national” identity, traditions and values’ (p. 54), which, by employing the discourses of globalisation and the uncertain future, effectively minimised the resistance from ‘below’. Koh further argues that Singapore’s educational imagination goes far beyond the realm of education, reflecting an ‘ideological and teleological project motivated by the interest of its economy and subject formation’ (ibid., p. 53). In other words, by embedding national imaginaries in the vision of education, the government seeks to respond to global economic competition and the changing job market by pursuing the ‘holistic development’ of young people. As illustrated above, the vision of ‘holistic development’ involved specific meanings, such as cultivating creative, entrepreneurial, well-rounded, and critical thinking talents, whilst simultaneously addressing the local needs through the introduction of National Education which focused on protecting Singaporean students’ cultural and national identity from the threats of globalisation (Koh, 2004).

Later in the launch of the *Teach Less, Learn More* (TLLM) framework in 2005, the Singaporean government incorporated the TSLN vision as the first of its four visions (‘The Vision for a Nation’), emphasising the urgent need for a transformative change in pedagogy and mindset. The core objectives of the TLLM framework were encouraging students to be more ‘engaged affectively, behaviourally and cognitively’ (MOE [SG], 2013, p. 5), and equipping them with a set of core skills, attitudes, and dispositions that would encourage students to develop a ‘mindset of innovation and enterprise, which is integral to the prosperity and well-being of the individual and the country’ (Fogarty & Pete, 2010, p. 98). Another major aim of the introduction of the TLLM framework was to ‘[improve] the quality of teaching in the classroom, to make learning engaging, enjoyable, and meaningful for students’ (MOE [SG], 2013, p. 2). Through the learner-centred vision ‘Teach Less Learn More’, schools and teachers were encouraged to revisit existing education strategies and to focus on the whole-person development of students, directing them to *teach less* and unburden students

so that they could *learn more*. The initiatives to support schools and teachers broadly included (MOE [SG], 2005, para. 6):

- Provide greater space for school-based flexibility in the curriculum by reducing content;
- Free up an average of 2 hours per week for each teacher by 2010 for professional planning and collaboration;
- Enhance professional development and mentorship of teachers;
- Strengthen the development of school leaders by establishing an Education Leadership Development Centre; and
- Give schools more ownership and encourage greater emphasis on character development.

Similar to Japan's *yutori* education, the TLLM initiative promoted the importance of experiential learning that cultivates students' 21st century competencies, most notably, creativity, problem-solving skills, and positive attitudes and values, particularly by giving flexibility to teachers and schools to develop and implement their own curriculum. Singapore's pursuit of 'holistic development' also entailed specific policy initiatives that sought to improve student well-being, such as the implementation of the Holistic Health Framework in 2007, which the importance of cooperation between parents, schools, the larger community, and the Singaporean ministries and agencies in developing students' total well-being, by, for example, observing their diet and exercising habits, and cultivating sports-for-lift mindset (MOE [SG], 2007).

The paradox of the TLLM has, however, been widely raised by scholars such as Koh and Lim (2006), Teo et al. (2013) and Tan et al. (2008). Teo et al. (2013) argue that, while the TLLM initiative elaborates on the reorientation of 'why', 'what' and 'how' of teaching, 'the dominance of the idea of "meeting the needs of the learner"...foreground the "how-to" questions about "engaging learners" while neglecting the "what" and the "why" of teaching' (p. 112) at the stage of implementation. Tan et al. (2008) also highlight the tension between the quantitative and qualitative focus of the TLLM. Whilst the name of the initiative suggests a focus on quantitative change (teaching 'less', learning 'more'), a close look at the official statements revealed a qualitative intent where the shift of focus from quantity to quality in education is stressed throughout. Furthermore, as high levels of student stress and teenage suicide became visible especially since the late 2000s, the criticisms towards the 'Primary School Leaving Examination (PSLE)' – the country's national examination taken by all students before the end of their sixth year in primary school – have increased to such an extent that calls were made to abolish the PSLE. The criticisms included that the age of 12 is too

young to go through high-stake examinations and early streaming (Gopinathan & Mardiana, 2013).

Prime Minister Lee Hsien Loong responded in 2012 that while PSLE could not be abolished, the government was aware that the examination was causing stress to children and hence will make adjustments to tone down the pressure placed on children (Yong, 2012). This brought several new measures that seek to ameliorate the concerns towards Singapore's competition-oriented education system and 'unhappy' students – for example, by not releasing the names of top performers in the PSLE and by implementing a new scoring system with a broader scoring band. More recently, the MOE announced that all examinations at Primary 1 and 2 are due to be removed along with the ranking system from report cards (Wood, 2018).

Nonetheless, whilst addressing the concerns of high levels of student stress and teenage suicide, as well as the social problems of competition-oriented educational culture, both TSLN and TLLM initiatives set the stage for Singapore to formalise its systematic approach to promoting 21st century competencies through education. Accordingly, in 2010, the MOE introduced the *Framework for 21st Century Competencies and Student Outcomes* (hereinafter, the 'Framework for 21st Century Competencies'), where it *listed* specific values and competencies that the country deems essential for students to develop to be prepared for the future. Central to the Framework for 21st Century Competencies was the introduction of the new subject 'Character and Citizenship Education' (CCE) in the early 2010s, where MOE [SG] (2012) stipulates that the subject contributes to the Framework for 21st Century Competencies by: 'emphasis[ing] the interconnectedness of the core values, social and emotional competencies and civic literacy, global awareness and cross-cultural skills that are critical for character and citizenship development of our students' (p. 1). Particularly interesting is the MOE's articulation of the social and emotional competencies; while the Social and Emotional Learning (SEL) framework was already introduced in 2005, it was in the early 2010s that the SEL project was formally incorporated into Singapore's CCE syllabus (MOE [SG], 2012). Considering that the goal of the CCE syllabus is to 'inculcate values and build competencies in our students to develop them to be good individuals and useful citizens' (ibid., p. 1), the emphasis of the SEL lies in what the country considers as crucial to the becoming of 'good' and 'useful' citizens.

The ways in which the importance of SEL is articulated in the CCE syllabus, however, require further scrutiny. The five broad domains of these social and emotional competencies are outlined in the 2012 syllabus: (i) self-awareness; (ii) self-management; (iii) responsible decision-making; (iv) social awareness; and (v) relationship management. The syllabus document not only stipulates these five domains as the competencies and skills related to citizenship but also emphasises the ‘assessment’ of these domains as an integral part of students’ CCE learning process (ibid., p. 31). The syllabus also links the CCE to more ‘global’ aspects of citizenship. Figure 3.2 below illustrates the Framework for the 21st Century Competencies listed in the CCE syllabus:

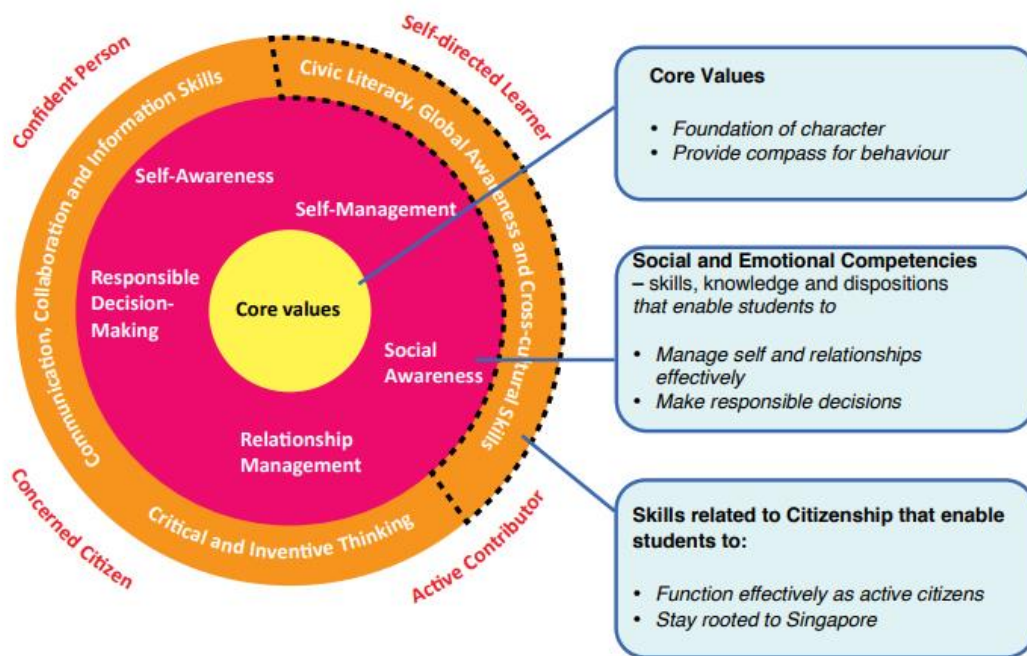


Figure 3.2. Framework for 21st Century Competencies in the CCE syllabus

Source: MOE [Singapore] (2012) *Character and Citizenship Education Syllabus: Primary*

The importance of SEL is illustrated in the pink-coloured circle in the middle layer of the circular diagram. The syllabus argues that the core values (inner layer), which include respect, responsibility, resilience, integrity, care, and harmony, are not only ‘fundamental for a person of good character and a useful citizen of Singapore’ (ibid., p. 2), but also interconnected with social and emotional competencies and the citizenship competencies (i.e., civic literacy, global awareness and cross-cultural skills). The outer layer then echoes the objective of the CCE: (i) function effectively as *active citizens*, and (ii) *stay rooted* in Singapore. In other words, the role of social and emotional competencies is closely aligned with the county’s

broader political objective to enhance students' strong sense of civic responsibility and 'emotional attachment' to Singapore. Not only the CCE 'operates with the assumptions that emotion can be taught and learned, that there are right and wrong ways to feel' (Stearns, 2019, p. 2), but it also conveys a reductionist view of happiness and well-being with prescribed and reified SEL curriculum.

The importance of equipping children with 'social and emotional competencies' is further elaborated on the MOE website, such as the following:

Having **strong social-emotional competencies** can **improve your child's school performance**.

Equipped with social-emotional competencies, students **will be able to demonstrate good character and citizenship**.

SEL is an essential part of your child's learning to help them **prepare for life beyond school**. It is critical that we provide a holistic education that involves the stimulation and training of **both cognitive and affective domains** of a child.

SEL increase our children's capacity to learn, give them **the tools to navigate current and future real-world contexts and challenges**, aspire them towards **personal and professional achievements**, enable them to experience **personal satisfaction and contribute to the society**.

(MOE [SG], 2022, n.p, my emphasis)

While the emphasis on the potential of SEL to enhance students' school performance and prepare them for life beyond school is both interesting in their own right, what is particularly noticeable is the government's active use of the 'uncertainty' narrative. The promotion of social and emotional competencies is justified in the name of preparing students to 'deal' with unforeseen and challenging situations effectively and make judgements (MOE [SG], 2012, p. 3), and that these competencies are essential for one to demonstrate 'good' character and citizenship.

Overall, the case of Singapore reveals that the pursuit of 'happiness' and 'well-being' related initiatives emerged initially from the calls for the need for 'human capital upgrading' and cultivating 'good' Singaporean citizens with strong nationalistic commitment in the face of uncertainty that globalisation, changing demographics and technological development would bring. The shifting nature of reforms from TSLN, TLLM, and now to CCE reveals the country's efforts to harness its education reforms to promote their imaginaries of 'good citizens', and update and fine-tune their citizenship education programme accordingly.

3.2.3 China: Happiness Education through ‘unburdening’

Unlike the other four East Asian developmental states, China under Mao Zedong (1949-1976) pursued a closed economic system with an emphasis on the principle of self-reliance. However, by the late 1970s, it became clear that China was excluded from the global trade market, where its ‘share of world trade dropped from 1.4% in the mid-1950s to 0.4% in the mid-1970s’ (Y. M. Leung, 1995, p. 205), and the country soon entered into a period of economic stagnation. Following the death of Mao, the country turned to a market-oriented approach to development with the launching of the ‘Open and Reform’ model in 1978, soon followed by a series of more radical reform measures proposed under the Seventh Five-Year Plan (1986-1990), such as the opening of capital markets, technical upgrading, and the improvement of the country’s economic efficiency (Chen, 2002). In parallel with such economic changes, under the leadership of Deng Xiaoping (1978-1989), the country’s national educational goals were also redefined to reflect the ideas of human capital theory. A greater emphasis was put on manpower development through the promotion of science and technology education, and curriculum modernisation, which Y. M. Leung (1995, p. 236) describes as ‘the policy shift from “politics in command” to “economics-in-command”’. The central government also decentralised some extent of responsibility and autonomy of school operation and funding to lower levels of government (Zhao et al., 2015), which, at the school level, meant the need to compete for resources. Greater pressure and burden were, therefore, placed on the shoulders of teachers and students for better job and academic performance. Therefore, by the late 1980s, it was clear that excessive competition and exam-oriented educational culture became major social concerns (ibid.).

To address these social concerns, the Chinese government rapidly introduced a series of educational reforms over the past three decades. The first large-scale initiative was the adoption of ‘quality education’ (*suzhi jiaoyu*) as a policy discourse. In 1999, the Central Committee of the Chinese Communist Party and the State Council issued a resolution on Quality Education, arguing that:

[1] The strength of national strength depends more and more on the quality of laborers and on the quality and quantity of various talents.

[2] Reducing the burden of primary and secondary school students' work has become an urgent problem in the implementation of quality-oriented education, which should be solved earnestly. Governments at all levels should establish and improve supervision and inspection mechanisms to reduce the burden of students' work. We should attach importance to the

physical development and intellectual development of infants and young children, and disseminate scientific knowledge and methods of early childhood education. (MOE [PRC], 1999, n.p)

Soon after the publication of this resolution, in January 2000, the MOE issued an *Urgent Notice on Alleviating the Overburden of Students in Primary Schools*, enhancing the regulations around the number and selection of textbooks, prohibiting the use or purchase of supplementary learning materials apart from textbooks, limiting the number of hours primary students can spend on homework every day, and abolishing the percentage grade scale system (MOE [PRC], 2000). The efficacy of these regulations, however, has been questioned over time, where parents used the ‘free’ time to send their children to private tutoring for better academic results (Tang, 2006).

China’s educational reform on ‘all-round development’ and ‘unburdening’ students has evolved more rapidly over the past decade. The *National Plan Outline for Medium- and Long-Term Education Reform and Development Plan (2010-2020)* released in 2010 emphasised, along with many other goals, the all-round development of students through moral, intellectual, physical, and aesthetic education (MOE [PRC], 2010). The physical health and fitness of students, for example, has been promoted through the launch of a nationwide Sunshine Sports Campaign. The Plan also identified the excessive school work burden on students as another obstacle to the physical and mental health of students and argued that it is the ‘common’ responsibility of the whole society to reduce the academic burden of students in compulsory education. Measures were introduced accordingly, such as reducing the amount of homework and exams, regulating class hours, and establishing a system of monitoring students’ academic burdens. The efficacy of the measures, however, was widely questioned. Teachers and parents expressed concerns about their students’ falling scholastic ability resulting from shorter school days, a minimal amount of learning, and a small amount of homework (Ni, 2017). It was also claimed that the Chinese government’s ‘Happiness Education’ policy is, in reality, exacerbating the academic performance gap among students from different socioeconomic backgrounds as affluent families would opt in for more private tutoring (ibid.).

In response to these persisting social problems and concerns, particularly towards educational inequalities, the General Office of the Chinese Communist Party and the Office of the State Council issued *Opinions on Further Reducing the Homework Burden and off-campus training*

Burden of Students in Compulsory Education (hereinafter referred to as the ‘double reduction’ policy) in July 2021 (MOE [PRC], 2021a). The double reduction (*shuang jian*) policy was introduced as part of the continuation of burden reduction policies introduced over the past decades with the goal to reduce both students’ homework and private tutoring burden and parents’ burden of education expenditure (Xue & Li, 2022). More drastically than the two cases (i.e., Japan and Singapore) above as well as Korea’s HEP (**Chapter 6**), China’s double reduction policy banned for-profit tutoring, forcing private education companies to register as non-profit organisations. Some of the other measures included:

- comprehensively reduce the total amount and length of homework, and reduce the burden of students' excessive homework;
- improve the school’s after-school service level to meet the diverse needs of students;
- adhere to strict governance and comprehensively standardise off-campus training behaviour;
- vigorously improve the quality of education and teaching to ensure that students learn well in school

The same day, the Ministry also released a question-and-answer brief in which the introduction of the double reduction policy was justified. MOE [PRC] (2021b) identified an array of social problems, most notably: (i) fundamentally unresolved short-sightedness and utilitarianism in the education system; (ii) heavy homework burden on students; (iii) illegal behaviours by private education companies; and (iv) heavy financial burden of parents. The Ministry then argued that, by tackling these problems through the double reduction policy, it will be able to promote ‘all-round development and healthy growth of students’ (*ibid.*, n.p.). Unlike Singapore or Japan, China’s version of ‘Happiness Education’ focused more on students’ psychological and physical well-being and promoting equity between students from different socioeconomic backgrounds. No mention was made of how its ‘unburdening’ policies could promote creativity, innovation, character, or even national identity.

As a newly implemented reform, the full implications of the double reduction policy on student happiness and well-being are not yet known. However, given its high similarities to Korea’s private tutoring ban in the 1980s under the 7.30 Educational Reform (7.30 *gyoyuk gaehyok*), which shut down all forms of commercial private tutoring but failed to remove them completely as they remained ‘underground’ (C. J. Lee et al., 2010), it is highly likely that the double reduction policy will take the similar path.

3.2.4 Hong Kong: Holistic development through Learning to Learn

Similar to Japan and Singapore, Hong Kong's call for a holistic, student-centred curriculum emerged at the turn of the century. The necessity of new aims of education, learning goals, and, ultimately, a curriculum reform was justified through the articulation of a series of unprecedented changes and future 'uncertainties' that students must be prepared for the 21st century (Education Commission, 2000). The Education Commission's (2000) *Learning for Life, Learning through Life* report then argued that:

In the tide of changes...[a]daptability, creativity and abilities for communication, self-learning and cooperation are now the prerequisites for anyone to succeed, while a person's character, emotional qualities, horizons and learning are important factors in achieving excellence. (p. 29)

The report's promotion of 'life-long learning' and 'all-round development' was also based upon these ideas of 'uncertainties'; that is, an 'ideal' educated individual will continue to strive for 'the prosperity, progress, freedom and democracy of their society, and contribute to the future well-being of the nation and the world at large' (ibid., p. 4). Soon after the report was published, the Curriculum Development Council outlined the seven learning goals of a new curriculum:

- recognise their roles and responsibilities as members in the family, the society, and the nation; and show concern for their well-being;
- understand their national identity and be committed to contributing to the nation and society;
- develop a habit of reading independently;
- engage in discussion actively and confidently in English and Chinese;
- develop creative thinking and master independent learning skills (e.g. critical thinking, information technology, numeracy and self-management);
- possess a breadth and foundation of knowledge in the eight Key Learning Areas (i.e. Chinese Language Education; English Language Education; Mathematics Education; Personal, Social and Humanities Education; Science Education; Technology Education; Arts Education; and Physical Education);
- lead a healthy lifestyle and develop an interest in an appreciation of aesthetic and physical activities

(Curriculum Development Council, 2002a, pp. 4-5)

Based on these goals, several changes have been proposed – both inside and outside the classroom – to move away from a rote-learning, teacher- and test-centred paradigm to a more holistic and student-centred paradigms. To increase students' interest in learning, the Education Commission abolished a national high-stakes primary school leaving examination, also known as the Hong Kong Academic Aptitude Test, in 2000, but instead introduced a

low-stakes Basic Competency Assessment that tracks each student's learning progress and difficulties and assesses their basic competencies in the three core subjects comprising Chinese Language, English Language, and Mathematics. Scholars, such as Tan (2019) and Carless (2010), however, argue that although Basic Competency Assessment is designed as a low-stakes assessment that assesses student 'competency', the assessment is, in essence, a high-stakes and disciplines-centred in the sense that it focuses on students' acquisition of disciplinary knowledge of the core subject instead of their creative achievement and pedagogic autonomy.

The report, entitled *Learning to Learn: The Way Forward in Curriculum Development* (hereinafter 'Learning to Learn') was released in 2001 and, at its core, again lay the idea of 'whole-person' development. The *Learning to Learn* report proposed restructuring students' learning experience of school subjects by infusing soft skills, particularly critical thinking, creativity and communication (Curriculum Development Council, 2001, p. 19) and, in so doing, helping children become active constructors of knowledge and grow as a whole and holistic person. The report also recommended creating more space in curriculum planning and implementation, such as by trimming and restructuring the curriculum and integrating 'Project Learning' into the curriculum.

Also central throughout the report are the references to life-long learning experiences and whole-person development. The report identifies five essential learning experiences, which include: (i) Moral and civic education; (ii) Intellectual development; (iii) Community service; (iv) Physical and aesthetic development; and (v) Career-related experiences. It suggests that these five experiences correspond to what the Education Commission (2000) identified as 'all-round and unique development in the areas of ethics, intellect, physique, social skills and aesthetics' (p. 4), albeit the insufficient explanation as to how the fifth learning experience ('career-related experiences') is aligned with the aims of education prepared by the Education Commission.

However, as both Ng (2013) and Tam and Chan (2016) argue, while the reform sought to address an exam-driven, results-focused educational culture in Hong Kong, schools continued to work under pressure as students' performance on their internally-devised school-based assessment (i.e., Basic Competency Assessment) became another form of accountability

measure to evaluate individual school performance. This, in turn, put extra pressure and stress on students as schools introduced further after-school lessons, drilling practice, and homework to improve students' performance in the Basic Competency Assessment (Tan, 2019). A series of criticisms and an online petition by parents to suspend Basic Competency Assessment in 2015 resulted in the overall review of the assessment, although the 'drilling' nature of the assessment was left unchanged (ibid.).

The *Learning to Learn* report also revealed a narrow interpretation of holistic and all-round education. One of the key four tasks the report identified as essential for whole-person development was replacing the existing 'Civic Education' with 'Moral and Civic Education'. The following year in 2002, the Curriculum Development Council issued the *Basic Education Curriculum Guide*, which posits that developing 'positive' values and attitudes is crucial for students' effective learning (Curriculum Development Council, 2002a). A strong emphasis, in particular, was placed on cultivating specific values, such as responsibility, commitment, respect for others, preservice, and national identity (Curriculum Development Council, 2001, p. 25), where the Curriculum Guide explains that these values would '[prepare] our students to meet the challenges of the 21st century ... and if fostered, should help students to become informed and responsible citizens committed to the well-being of their fellow students' (Curriculum Development Council, 2002b, p. 2). Underlying the Curriculum Guide's descriptions of each of the values, however, are the ideals of patriotic and nationalistic citizens (ibid., pp. 2-4):

[1] Globalisation, momentous technological advances and the emergence of a knowledge-based economy present pressures and challenges that are more daunting than ever to our young people. Perseverance, which is considered **as a strength of the Chinese people**, is an important quality that they should embrace to help them **face life's challenges and cope with adversities**. (original emphasis)

[2] In a world with such diversity, they need to develop communication skills and more importantly, acceptance and respect for others so as to **appreciate and tolerate views and beliefs different from their own**. (original emphasis)

[3] They need to understand the impact that their behaviour has on others, and realise that the **well-being of an individual is inextricably bound up with the collective well-being of the community**. (original emphasis)

[4] The return of Hong Kong to China since 1997 calls **for a deeper understanding of the history and culture of our motherland**. There is a need to strengthen the sense of national identity among our young people. It is imperative to **enhance their interests in and concern for the development of today's China** through involving them in different learning experiences and life-wide learning. Instead of imposing national sentiments on them, we must

provide more opportunities for young people to develop a sense of belonging to China. (original emphasis)

[5] A sense of commitment to one's work and to others is of paramount importance as this **is a basic attitude for the realisation of core personal and social values.** (original emphasis)

The guide then elaborates that school programmes (e.g., Civic Education, Environmental Education, Health Education, and Media Education), school morning and weekly assemblies, and class teacher periods need to focus on the development of the above values, for example, by developing students' understanding, appreciation, and 'love' of the natural environment of China, the historical 'achievements' and culture of the Chinese nation (e.g., the national flag-hoisting ceremony), (ibid., pp. 5 15, 16).

Unlike other East Asian cases, specific meanings of happiness, such as 'unburdening', 'freedom', 'relaxation', or 'psychological well-being' were not evident in both *Learning for Life*, *Learning through Life* and *Learning to Learn* reports. While both 'soft skills' and 'alleviating students' burden' emerged as important aims of these reports, what was more prominent was the reports' constant emphasis on the importance of equipping with 'positive' values and attitudes as 'committed' members of the nation and society (Education Commission, 2000; Curriculum Development Council, 2001, 2002).

3.3 Discussion and Conclusion

This chapter demonstrated that although the four East Asian societies sought to address similar concerns of excessive competition in education, high levels of student 'unhappiness', burden, stress and suicide rates, school violence, and lacking creative and critical thinking skills, the 'timing' of the reforms suited each society's own needs, as well as their broader political and economic objectives.

At a glimpse, there are signs of regional diffusion or, more generally, a policy convergence as these reforms were all *initiated* relatively in a similar time period between the 1990s and 2000s. Discursive similarities can be found in their illustration of the original impetus for reforms, where each society sought to address the anxieties of 'globalisation' and future uncertainties through humanistic policy signifiers and initiatives, such as relaxation, unburdening, happiness, and freedom. However, what this chapter demonstrates instead is

that a closer look at the narratives presented in the reform and curriculum documents, their enactment, and the overarching shifts in their focus reveals a substantial degree of ‘divergence’. These reforms were largely dependent on each government’s changing *latent* objectives over time, such as fostering patriotism and nationalism among students (particularly in the cases of Singapore and Hong Kong), the need for ‘human capital upgrading’ (Singapore, China), ensuring their competitiveness in the global league (Japan), and addressing social injustice in education (China). Particularly in Japan and Singapore, new goals were added to their reforms where both societies shifted their attentions from ‘relaxation’ and ‘unburdening’ students towards cultivating ‘ideal’ and ‘good’ citizens through Moral Education (Japan) and Character and Citizenship Education (Singapore) but under the same policy rationales and concerns such as low student engagement in learning and high levels of student stress and suicide.

The overview of education reforms of similar nature that took place in these East Asian societies opens up a possibility of a horizontal comparison with Korea’s introduction of the Happiness Education Policy in 2013 (**Chapter 6**), which will be discussed further in the Conclusion chapter (**Chapter 8**).

Chapter 4 Methodology

4.1 Introduction

This chapter begins with an explication of the epistemological, ontological, and methodological approaches that inform this thesis. It then provides detailed descriptions of how this research was undertaken, what data were collected and how they were analysed. It identifies a range of methodological challenges encountered throughout the research process and potential limitations of the study. As explained in the chapter, my methodological position is fundamentally interpretivist in the sense that it considers all three levels of education policy actors (IOs, national policy actors, and school-level actors) as active ‘recontextualising’ agents of knowledge (Bernstein, 1990), rather than passive receivers or transmitters of policies. The data that informs the findings and arguments of this thesis is influenced by power relations, subjectivity, and the structure of the sources. These sources include, but are not limited to, the broader mission and culture of the institution, the nature of the funding received, and even the biological characteristics of both the participant and the researcher (Walters, 2009).

This chapter is structured into four parts: first, it elaborates on the epistemological and ontological approaches of the research. Second, it presents the data collection methods used to answer each of the three research questions. Third, it illustrates the methods used in the analysis of the data. Lastly, it examines both methodological challenges and the ethical considerations of this study and elaborates on the actions taken to address the issues.

4.2 Epistemological and ontological approach

A paradigm is a set of beliefs and traditions that serve as useful guidance in making decisions about appropriate ways to approach a particular research problem. This thesis is informed by an interpretivist paradigm, which, in a qualitative research study, involves a range of frameworks such as, but not limited to, phenomenology, hermeneutics, and symbolic interactionism. Phenomenology, in particular, is a philosophical approach that seeks to interpret the world by ‘gazing’ at a phenomenon (Qutoshi, 2020). This act of ‘gazing’ is dependent on the perspective and relational positionality of the ‘gazer’; one may, as

Schweisfurth (2013) illustrated, take a ‘telescopic’ view of an educational phenomenon in search for broad patterns or, instead, a ‘microscopic’ view to unpack and understand important factors that shape a phenomenon. This ‘gaze’ is also inherently individual, or even personal, shaped by one’s positional identity constructed by the experience of ‘mobility’ (T. Kim, 2014) and how one relates to others (Sobe, 2018). In other words, as a method of inquiry, phenomenology centres on relationality, illuminating how a particular phenomenon is perceived by the actors involved and how these actors construct meanings based on their day-to-day living experiences.

Central to the interpretivist paradigm is that it postulates that reality (or the truths about *socially constructed* reality) is layered with multiple social constructions, particularly with language, sociocultural consciousness and shared norms (Myers, 2019). In other words, the interpretivist paradigm focuses on understanding different interpretations of a particular phenomenon, the relationship between human beings and the environment they are situated in and delves into the historical, social, and cultural situatedness of human experience. The discussion of signifiers in **Chapter 2** also reflects the constructivist-interpretivist paradigm, wherein ‘meanings’ conferred to word signs neither necessarily correspond to what is ‘laid down in a dictionary, nor is it to assume their pre-established truth value in a communicational context’ (Bundgaard, 2010, p. 375). The stance interpretivism takes is that knowledge is not static and rather relational and perspectival (Hay, 2011); that is, knowledge is understood and (re)constructed differently by different individuals, and is dependent on one’s ‘making sense’ of the world.

As also explained in **Chapter 1**, the interest and remit of this thesis go beyond identifying different meanings of happiness as constructed in the field of education policy and practice. The three analysis chapters (**Chapters 5, 6, and 7**) explore how different meanings of happiness promoted by different education policy actors can be aligned with their wider motives and purposes. Second, it addresses why these actors choose to promote certain meaning(s) of happiness in education over others, which inevitably situates the whole discussion of motives and reasonings of each stakeholder within the political, social, and cultural environment individuals belong to.

The very act – and possibility – of ‘cherry picking’ the meaning(s) of happiness that suits their interests and belief system naturally leads this research to view reality from a constructivist stance. The new wave of literature on ‘happiness’, ‘emotion’, ‘social and emotional learning’, as well as ‘well-being’ led by critical theorists criticised how these notions are individualised and subsequently misinterpreted, as well as how ‘socially embedded investments, power relations and issues around justice and equality are obscured through a focus on personal control and emotional stability’ (Gillies, 2011, p. 186). Studies on the sociological understanding of happiness have sought to identify what people define as happiness and position different definitions. As Binkley (2014) argues, the notion of happiness became:

...something one pursues in a spirit of entrepreneurship and opportunity, wherein self-knowledge derived through relations with or under the tutelage of others appears not as a purpose or an end, but as an environmental circumstance to be maximized, or as an organizational resource to be exploited...as an entrepreneurial project, happiness serves a specifically homologous function, providing an echo in emotional and personal life of a form of government that similarly envisions a life of entrepreneurship, this time played out in the realm of economic conduct. (p.3)

A similar approach has been taken by the edited volume *Critical Happiness Studies* (Hill et al., 2020). The contributors to the volume revealed not only the historical specificity of the understanding of happiness (Cederström, 2019) but also how the notion has been conflated with ideas such as ‘freedom’ and ‘hope’ as it became central to the performance society, in which the pursuit of happiness is viewed as both the right thing to do and the path towards achieving freedom (Petersen, 2019). What the critical literature commonly suggests is that ‘there exist multiple realities rather than multiple conceptualizations of one reality’ (C.-J. G. Lee, 2012, p. 407), wherein realities – that shape the conceptions of happiness – themselves are contingent and historically, culturally, and socially embedded.

Such a constructivist ontology has, therefore, encouraged me, as a researcher, to be open-minded in terms of how individuals (or institutions) describe and situate the place of happiness (or, generally, well-being) in education policy and practice and that their constructions are in a ‘constant state of revision’ (Bryman, 2012, p. 33). This was particularly evident in **Chapter 5**, which illuminates that OECD has revised its focus on happiness in education, initially from a narrow understanding of student happiness as school satisfaction to a relatively broader conceptualisation as student well-being (i.e., well-being as

multidimensional) and, most recently, to individual and collective well-being (i.e., well-being as an outcome of education).

4.3 Data collection methods

This section provides a detailed description of each data collection method used for **Chapters 5, 6, and 7**. Each of these chapters focuses on the same question of why and how the concepts of happiness and well-being have emerged and been promoted by three different levels of education actors, consisting of the OECD as a global actor, two most recent South Korean governments as national-level actors, and school-level actors (e.g., teachers, school leaders and education professionals).

Each of these three levels was informed by its own dedicated research question (see **Chapter 1; Table 4.1**); however, that does not necessarily mean that the collected data for one level was always exclusive to the other two levels of analysis. For example, as will be discussed in more detail, interviews with teacher educators revealed that many of them were, in fact, also involved in the national-level policy process, either actively participating in regular meetings with policy-level stakeholders (e.g., superintendents of regional educational offices) or (co)authoring government-funded research projects. In other words, many of the interviewees participating in this study held ‘dual positions/identities’ and hence, as noted earlier, interpretivist-constructivist paradigms pertained to explaining how holding multiple positionalities may have had an impact on my interviewees’ perception of the aim(s) of education and the place of happiness.

Table 4.1. Data Collection Summary (for full list of data, see Appendix 1)

Analysis Level	Research question	Sources of data
Global (Chapter 5)	RQ1-ii. How has the notion of happiness been framed in the OECD's education agenda over the past decade, and why?	<ul style="list-style-type: none"> • OECD PISA Reports (2012, 2015, 2018) • Future of Education and Skills reports (2019) • Survey on Social and Emotional Skills (2021) • Working papers • Public speeches, blog entries and press releases
National (Chapter 6)	RQ2. How and why was Happiness Education Policy (HEP) promoted in South Korea and what conception of happiness did it embody?	<ul style="list-style-type: none"> • Government/MOE documents • National think-tank reports • Press releases • Presidential speeches • Interviews with policy intermediaries
Subnational (Chapter 7)	RQ3. How do school-level actors (teachers, school leaders and education professionals) understand student happiness and well-being and their role in promoting them, and why?	<ul style="list-style-type: none"> • Surveys ($n=50$) • Interviews with survey participants ($n=10$)

This study distinguishes itself with its innovative approach in the field of comparative education. It employs a mixed-methods case study research design, which incorporates documentary evidence, semi-structured interviews, and surveys. A generic case study typically relies on one or multiple qualitative methodologies, facing challenges in presenting a rigorous and comprehensive portrayal of the case (Guetterman & Fetters, 2018).

In the field of comparative education, qualitative research design continues to predominate, as evidenced by Zha and Tu (2016). Depending solely on a single research paradigm, however, whether quantitative or qualitative, presents several methodological challenges. Strictly labelling research within these categories overlooks the potential presence of a 'qualitative' dimension within quantitative research, and vice versa (Ercikan & Roth, 2006). Recognising this limitation, scholars across various disciplines who utilise the mixed-methods approach have often clarified their focus by elucidating their research design through specific terminologies like convergent mixed-methods design, quantitative-dominant, or qualitative-dominant mixed-methods case study design (De Lisle, 2018/2019).

Whilst studies utilising a mixed-methods case study research have been relatively scarce in the field of comparative education, with a few exceptions – such as Naveed et al. (2017) and Sakata (2019); a notable upward trend in interest for mixed-methods research as a whole has been observed (Colclough, 2010). This thesis advocates for the relevance and significance of this methodological approach in the field by demonstrating how key axes of comparison – space, time, and level – within a case study can emerge through the integration of qualitative and quantitative research.

Data collection and finding: OECD as a global actor (Chapter 5)

Documents could be used as stand-alone research data; this is particularly more common in specialised forms of research, such as historical and archival studies (Bowen, 2009). Data gathered for **Chapter 5** are largely a corpus of OECD’s publicly available written materials, both primary and secondary, which was then supplemented by a collection of oral materials produced from the clips of public speeches, forums, and seminars (see Appendix 1 for the full list of data).

For both types of materials, I collected and analysed the materials published over the last two decades, which generally accorded with the broader trend of the so-called ‘post-GDP’ (or ‘beyond-GDP’) agenda from the late 2000s. In fact, the concept of well-being became predominant in the OECD’s initiatives in the 2010s, marked by the Organisation’s rebranding of its logo and mission statement from ‘*Building Partnerships for Progress*’ to ‘*Better Policies for Better Lives*’ as a celebration of its 50th anniversary in 2011. The document materials were collected by taking the following three steps. First, using Google searches, I entered simple search terms (e.g., “education” “happiness” site:oecd.org; “education” “well-being” site:oecd.org) to navigate what is available on the OECD’s website and online library. Second, any materials selected in this study had to fit into either of the following three statements: (i) the material identifies students’ happiness and well-being as outcomes of education; (ii) the material identifies happiness and well-being as a means to achieve certain goals; and (iii) the material identifies happiness and well-being as an explanatory background factor. Having these specific criteria helped to increase the robustness of the study. Third, I did not consider particular materials, such as blog articles, PowerPoint presentations, and

preliminary papers submitted to conferences organised by the OECD, unless they were produced or presented by someone directly involved in the OECD.

Through these steps, I identified three ‘categories’ of reports that reflected the OECD’s understanding and conception of student happiness. The first category reflects the Organisation’s efforts to ‘measure’ student happiness, such as the official PISA reports (PISA 2012, 2015, and 2018), the student well-being framework, PISA in Focus documents, and any related working papers.

The documents subsumed under the second category identify happiness as the ‘goal’ of the Organisation’s futuristic education agenda, also known as the *OECD Future of Education and Skills 2030*. A wide array of reports and papers, including but not limited to background papers, brochures, conceptual learning frameworks, meeting documents (e.g., informal working group documents), progress reports, and concept notes, were collected and subsequently analysed.

The third and final category includes a recent initiative that the OECD has undertaken that signifies the possibility of some changes in the meanings the OECD attributes to the notion of ‘happiness’: the 2021 Survey on Social and Emotional Skills. By the time of writing this thesis, there has been a constant and increasing supply of materials, such as PowerPoint Slides. While this made it easier for me to attend the OECD’s live streamed sessions relevant to the initiative, it also posed a challenge in ensuring the inclusivity and completeness of the data gathered. To mitigate this, the collection and analysis of the data under this third category largely focused on the oral transcript of the launch event and the core report(s) of the initiative.

Data collection and analysis: Policy level in South Korea (Chapter 6)

Documents

Documents consist of the primary data for **RQ 2** due to their crucial role in contributing to the transversal and historical facets of this research question. Documents were collected from the Korean government’s official policy information database (<https://policy.nl.go.kr/>), the

Ministry of Education (MOE), the Korean Educational Development Institute (KEDI), Korea Institute for Curriculum and Evaluation (KICE), and regional education offices in Korea. These sources were chosen as they are either government institutions or government-funded think tanks, hence best reflecting the emergence or changes, if any, of Korea's policy-level interest in student well-being and happiness.

Same collection rules were applied for these national-level documentary materials. I used the same simple search terms to navigate each of the websites and their databases. Second, I collected any materials that reflect either of the following three conditions: (i) the material identifies students' happiness and well-being as outcomes of education; (ii) the material identifies happiness and well-being as a means to achieve certain goals; and (iii) the material identifies happiness and well-being as an explanatory background factor. I also collected any policy documents that draw on globally or nationally produced data on student well-being and happiness (e.g., PISA results on student well-being, World Happiness Report's rankings on country happiness) as a source of legitimacy. The purpose of this is to examine the legitimisation processes involved in the making and implementation of the Happiness Education Policy (HEP), focusing on how national politicians and policymakers produced legitimacy through what Schriewer (2003) describes as 'externalisation' (for 'externalisation', see **Chapter 2**). Any materials, such as blog articles, PowerPoint presentations, and preliminary papers submitted to conferences organised by the Korean government or aforementioned think tanks, were not considered unless they were produced or presented by someone directly involved in said institutions.

While there was no specific timeframe set for this study, the country's introduction of HEP in 2013 largely coincided with the broader call for global advocacy of happiness and well-being in education. This enabled a straightforward comparison between the OECD and Korean policymaking level data and an examination of whether the discourses and data produced by the OECD (or any other IOs) have been reflected in the national policy and research works.

Semi-structured interviews

Whilst analysing documents is effective in identifying major themes and keywords, it is also difficult to extract implicit intentions and personal interests of related stakeholders just by

deconstructing the texts. Interviews, on the other hand, can be used as one of the multiple methods for researchers to probe into not-so-obvious aspects of texts and to complement the findings from the documentary materials by unpacking contextual issues pertaining to on-the-ground issues (Roulston & Choi, 2018; Smit, 2005).

Interviews for this study were reflective in nature; although questions given to interviewees over the course of interviews included those related to new and ongoing education policies (e.g., the high school credit system, GCE), the focus was predominantly on their involvement and perceived changes in the broader development of happiness and well-being-oriented educational projects over the past decade. Semi-structured interviews are well aligned with the comparative case study approach, particularly because they fully attend to the socially constructed nature of knowledge production (Bartlett & Vavrus, 2017). The interviewees for **RQ2** consisted of academics, teacher educators, external policy consultants or researchers partaking in government-funded projects; their ‘partial involvement’ in government or government-funded projects enabled them to speak more openly about their experiences and views of the country’s promotion of student happiness in education.

The decision to focus on policy intermediaries as the primary interview subjects for Chapter 6 is rooted in their distinctive positionalities. Positioned as both ‘inside-outsiders’ and ‘outside-insiders’, these interviewees possess a unique perspective that enables them to share their distinct contextual positioning and subjective experiences. In doing so, they transcend the limitations of the traditional ‘insider’ and ‘outsider’ binary within the qualitative paradigm, providing invaluable insights into Korea’s Happiness Education Policy. Some served as invited academics, offering consultations on the policy evidence for the HEP, while others functioned as teacher educators on student happiness or as external consultants for regional educational offices. Consequently, they had substantial access to insider information, allowing them to identify the dynamics between policy and political actors. They possess the capacity to offer critical perspectives on the reform itself, while also assuming an impartial stance when identifying the key actors behind the reform and the intricate ways in which the policy process becomes politically designed and driven.

Hence, these interviewees were purposefully recruited and sampled using the convenience sampling approach (Lopez & Whitehead, 2013). The convenience sampling approach, also

referred to as 'accidental sampling', is one of the most common types of qualitative sampling approaches. In this method, participants are recruited based on their convenient accessibility to the researcher and their willingness to share insights on the subject. This enhances the social constructivist nature of the study, as I deliberately '[set] out to find people who can and are willing to provide the information by virtue of knowledge or experience' (Etikan et al., 2015, p. 2). This study also aimed to address traditional critiques towards the convenience sampling approach, such as concerns about the quality of data (ibid.), by carefully examining the interviewees' roles and involvement in the HEP reform.

In this study, a total of four interviews with national-level actors were conducted, either via Zoom or in-person. The purpose of these interviews was mainly to clarify, complement, and triangulate the findings from the documentary analysis. All the interviewees were initially contacted and communicated via email. Both the medium and location of each interview were chosen by my interviewees, especially since Covid-19 has struck our daily lives six months after this study began. All interviews had to be scheduled and planned according to the fluctuating lockdown restrictions in Korea, and in the end, only one interview was conducted face-to-face at a café in Korea with appropriate social distancing measures in place. It should also be noted here that this study and its plans for data collection were approved by the UCL Ethics Committee prior to actual data collection. None of the interview requests were declined.

Each interview was conducted in a language chosen by the participant; three interviews were conducted in Korean and one in English (non-Korean speaker). Interviews spanned between 60 and 90 minutes, all of which were fully audio-recorded and later transcribed verbatim in the language each interview was conducted in. Any interviews conducted in Korean were partially translated into English for quotations. During the interview, not many field notes or memos were taken as neither body language nor facial expression was a focus of interest; instead, I focused more on keeping eye contact steady throughout each interview. Although all four interviewees consented to be identified, I chose to use pseudonyms (e.g., *Interviewee #1*) for the purpose of publication (Table 4.2). This does not mean I have fully anonymised their identities; while the interviewees' precise affiliations have not been revealed (e.g., 'Professor at a Korean Higher Education Institution') in this thesis, general descriptions of

their positions and the roles they play as policy intermediaries have been provided under their direct permission.

Table 4.2. Interviewee information

Pseudonym	Analysis Level	Position and Affiliation	Method of interviewing
Interviewee #1	Global/national	Associate editor of World Happiness Report Professor at Korean Higher Education Institution	Zoom
Interviewee #2	National	Professor at Korean Higher Education Institution External advisor to Seoul Metropolitan Office of Education	In-person
Interviewee #3	National/subnational	(i) Senior Researcher and (ii) Teacher educator at a Centre run by Korean Higher Education Institution	Zoom
Interviewee #4	National/subnational	(i) Professor at Korean Higher Education Institution, (ii) Teacher educator, and (iii) Activist on progressive, alternative, and democratic education	Zoom

In these interviews, I aimed to unpack each interviewee’s perception of (i) the broad aim(s) of education; (ii) ‘happiness’ as a policy keyword; and (iii) HEP reform and its conception(s) of happiness. As mentioned above, interviewees were not the employees of the MOE, the government think tanks or regional education offices. The point of these interviews was to gain external insights from those who can express critical but first-person accounts regarding the government’s policy turn to happiness and well-being-oriented education.

Despite the diversity in their occupations, there were some commonalities amongst them; that is, they were all in a ‘position’ of delivering their beliefs and knowledge of what education ought to aim for, where their impact spanned across different levels (i.e., an editor of a *global-level* report that targets and consults government agencies interested in the idea of happiness; university academics who teach and train teachers in higher education institutions). Most also had either first-hand experiences in defining and measuring happiness and well-being in educational or non-educational contexts or have participated in institutional meetings or

academic discussions related to it. Hence, it was unsurprising that many of my interviewees were more than capable of sharing their experiences, for example, not only as national policymaking actors but also as global- or school-level actors (see Table 4.2); for example, one of my interviewees (Interviewee #1) not only shared his experience with Korean policymakers as an academic researcher but also his experience and vision as an Associate Editor of World Happiness Report, a publication of the United Nations Sustainable Development Solutions Network (UNSDSN).

Data collection and finding: School level in Korea (Chapter 7)

To understand how the place of happiness and well-being in education is constructed in the minds of teachers, school leaders and education professionals, I employed a combination of questionnaires and follow-up interviews as a primary data source to address **RQ 3**. This mixed approach was largely inspired by a research project conducted by Ashton et al. (1975) who distributed a series of questionnaires to teachers teaching children within the 5-11 age range to collect their opinions of the aims and priorities of primary education and several focus group discussions, both structured and unstructured, to understand how these teachers handle discussions of aims in a conversational environment. The ways in which Ashton et al.'s methodological approach shaped this study will be explained where relevant.

An online survey (see Appendix 3) was an important facet of **Chapter 7** as it enabled this study to access a wide target population within a relatively short period of time (Cohen et al., 2007). It also facilitated this study to wear a 'wide-angle lens...to capture a diversity of perspectives, experiences, or sense-making' (Braun et al., 2021, p. 3). The first part of the survey focuses on simple demographic and job-related questions, such as age, region, employment status and role (e.g., teacher, school leader, school inspector), type of school respondents are currently working at, and number of years in the teaching profession. These questions were largely designed in a click-box/closed-response format. In case the respondents fail to find an option that is closest to their best answers, each of these questions included an 'other(s) – please specify your answer' option.

The second part of the survey is calibrated with sophistication but more open compared to the earlier closed questions, providing much space for respondents to express themselves. My initial intention for this part of the survey was to ask the respondents to write statements about their perceived aims of education. However, when Ashton et al. (1975) took a similar approach in their initial questionnaire, they found answers very general and wide-scoped, making them difficult to collect a precise and meaningful sampling of opinions. Hence in their reconstructed questionnaire, they specifically asked their respondents about their opinions of the 72 aims of primary education, which they collated during the course of focus group discussions. Respondents were guided to assign a level of importance to each aim using a five-point scale (i.e., from 5 indicating *of the utmost importance* to 1 as *of no importance*), with an additional option to indicate '0' ('this should not be an aim of primary education'). Although their list of aims was specifically targeted to the primary education level, its coverage of intellectual, physical, aesthetic, spiritual/religious, emotional, personal, social, and moral aspects of development was comprehensive enough to apply to all levels of formal education.

Initially, I planned to adapt most of Ashton et al.'s (1975) 72 aims of primary education, excluding any questions that are either irrelevant to the Korean context or mainly reflect and speak of the UK context of the 1970s. During this early stage of question screening, any country-specific statements such as *'The child should try to behave in accordance with the ideals of the Christian religion'* were excluded, and any aims specific to primary education were recontextualised as a general aim of education. Below is an example of how I recontextualised the aim of primary education to that of general formal education:

Ashton et al.'s (1975) original version:

'The child should be beginning to understand aesthetic experiences and should be able to talk about them; for example looking at pictures and sculpture, listening to poetry and plays'.

The version used in my survey:

'The aim of education is to equip students with qualities essential to understanding aesthetic experiences and talking about them; for example, looking at pictures and sculpture, listening and reciting poetry'.

All the original, translated, and recontextualised questions were proofread and revised multiple times through rounds of discussions with my two supervisors and colleagues in the IOE doctoral community to ensure the trustworthiness of the data. I also drew on the findings of **Chapter 5** to include more recent narratives, as exemplified by the OECD over the past

decade (e.g., digital literacy, financial literacy, cultivating global citizens, contributing to global sustainable development). This inclusion and exclusion process has provided me with the final set of 40 aims of education. To minimise any selectivity bias created by the researcher (myself), respondents of this study were asked if any aims of education that they deem important were missing from the list, and to share it/them in a blank box they feel is important.

In their questionnaire, Ashton et al. (1975) also sought to find out whether teachers prioritise an *individually oriented purpose of education* or a *socially oriented purpose of education*; hence after providing a set of brief descriptions of each, they guided their respondents to give weight to each by sharing 5 points between the two statements (i.e., if the respondent gave 0 to individually oriented goal, they must give a 5 to socially oriented goal). A similar approach has been taken in my questionnaire to understand whether school-level actors in Korea prioritise individual or social purposes of education.

Among 50 questionnaire respondents, a total of 23 showed interest in participating in a follow-up interview. They submitted their mobile number and email addresses and gave their permission to be contacted. I did not impose any selectivity criteria in choosing interview participants apart from deliberately excluding two respondents who used to be my former teachers a decade ago to prevent any disruption in open communication between the researcher and the interviewees. Hence, I contacted a total of 21 survey respondents to arrange follow-up interviews.

The response rate from the first contact was very low – only seven responded after my first interview request. After waiting for another 10 days, I sent out a series of follow-up messages as a gentle reminder. Eventually, another three responded with a positive response, but one School Commissioner decided to withdraw from participation as he felt he is too new to his job to provide an adequate response. Such reluctance among school leaders and education professionals working for local and regional education offices seemed to be a recurring issue. In the end, I secured and conducted 10 interviews, which accounts for approximately 20% of the questionnaire sample. The demographics of the interviewees can be found in **Chapter 7**.

Interviews were conducted either face-to-face or via Zoom, depending on their preference. Three interviews were held face-to-face and seven were conducted via Zoom. The different

interview settings seem to have an impact on the length of responses and, ultimately, the overall duration of interviews. Three of the longest interviews (max. 80 minutes) were conducted face-to-face, whereas the shortest ones were conducted online. In this research, the length of interviews was perceived to be associated with the quality of data, although previous researchers who compared online video interviews versus in-person interviews found the quality to not differ (Archibald et al., 2019; Deakin & Wakefield, 2013). This could be attributed to a range of factors. First, the depth of rapport established via Zoom was perceived to be different from that built face-to-face. During in-person interviews, it was easier to make informal conversation before ‘getting down to business’ particularly as these interviews were taken place in a private meeting room. On the other hand, more than half of the online participants joined the interview in their school classrooms or staff office, and hence they seemed to be warier of sharing honest responses. As Irvine (2011) has also pointed out, these variations in the nature of the interview set a different overall flow and atmosphere.

All online participants were asked to go through the consent form emailed at least a week before their scheduled interview date and return the signed consent form before their interviews. For the participants of face-to-face interviewees, a physical consent form was provided, and they were given sufficient time to read, ask questions and sign the form. Following formal greetings, I began each interview with a brief explanation about the nature of the study and repeated some of the items that participants have agreed on as per the consent form (e.g., recording, freedom to withdraw or redact responses). Interviews lasted between 25 and 80 minutes with an average length of 45 minutes and were audio-recorded and transcribed verbatim under both written and verbal consent of the interviewees. All school-level actor interviews were conducted in Korean based on their preference; any direct quotes cited in **Chapter 7** were translated into English. The trustworthiness of the translations of the quotes included was discussed with competent Korean-English bilingual speakers before data analysis.

The interviews were semi-structured, which means that I had a standard interview schedule as follows: (i) background information of an interviewee; (ii) generic questions on their definitions, beliefs, and experiences of ‘happiness’ and ‘Happiness Education’; (iii) perception of their role in promoting student happiness and, if any, the obstacles they face; and (iv) a ‘thinking outside the box’ activity with a question of “If you are given an

opportunity to design a programme that promotes student happiness with sufficient support and resources, what would that be?’ (for a sample interview schedule, see Appendix 5). The interview schedule, however, was flexibly deployed per the pace of the interview and responses given by the interviewees. For example, when I asked my interviewees if any curriculum or outside-curriculum activities in their schools reflect their vision of Happiness Education, one mentioned that their school organised ‘some project activities that would enhance students’ social and emotional competencies’ (Sunny, Primary school vice principal & former school commissioner). I found their response interesting and hence followed up by asking if there were any anecdotes to share and adjusted my further questions accordingly. On such occasions, I also looked for and unpacked any potential contextual factors that could have underpinned their responses.

4.4 Data analysis

Qualitative data: Thematic analysis

Qualitative data can be studied in many ways (e.g., general inductive approach, discourse analysis, phenomenology) depending on the nature of research. The focus of this thesis lies on identifying how the concepts of student happiness and well-being are understood and constructed among three levels of actors. In the course of analysis, I took a close look at how these actors articulate the meanings of happiness, and how their reconstructions of happiness are regulated and communicated within and across levels. All raw documentary materials (i.e., OECD reports, Korean policy documents, policy intermediary and school-level actor interviews) were read and coded using the Nvivo software.

The analysis process I undertook follows the steps of thematic analysis proposed by Braun and Clarke (2013); first, each document was read carefully to familiarise myself with the data. Second, any recurring keywords were jotted down in the margins of each document, and all the sentences and paragraphs that mention anything related to student happiness and well-being were highlighted and assigned a particular code (e.g., the role of teachers; indicators that intend to measure students’ perception of happiness at school). Here, a mixture of inductive and semi-deductive interpretive approaches was used; that is, while it followed an

inductive approach in the sense that there were no preconceptions or deductions from a pre-given framework (Cohen et al., 2007; Gioia et al., 2013), it also involved what Lashewicz et al. (2016) characterise as a *semi*-deductive approach in that I focused on instances where interviewees narrated their own definitions and understandings of happiness and – in the case of school-level actors – their roles in promoting student happiness. This has produced a large number of data-derived semantic codes, with more than 40 different codes identified in this first coding process. Third, each of these 40 categories/codes was re-read, searching for themes and patterns across documents; based on this re-reading, many of the initial categories were merged or deleted depending on their degree of overlap – for example, during the analysis of Korea’s HEP documents, I merged the codes ‘Korea’s performance in World Happiness Report’ and ‘Korea’s performance in PISA student happiness and well-being survey’ into ‘referencing external evidence’. These processes enabled the establishment of themes, from which the findings in regard to how the themes have changed over time were reported.

Another important consideration given throughout the analysis process was whether to pursue themes at a ‘semantic or ‘latent’ level. The semantic approach focuses on the surface meanings of the data, where the research does not look beyond what is written in the data source (Javadi & Zarea, 2016). The latent approach, on the other hand, is research-driven, meaning that the researcher focuses on unpacking any hidden or underlying meanings, ideas, and assumptions that shape the semantic content of data through an interpretivist lens. The analysis of OECD reports and policy documents of the Korean government largely involved semantic coding, whereas oral materials (especially the interviews with policy intermediaries and school-level actors) predominantly involved the latent approach as much of the individual accounts required an understanding of the respondents’ situated socio-political contexts and positionality. Based on their relevance to my research questions, the remaining codes were then defined and named according to each research question with caution and flexibility to avoid ‘[tailoring] the material to [my] own theoretical assumptions by reducing the analysis to a search for locations in the text that are suitable as a proof’ (Schmidt, 2004, p. 255). An example of an initial mapping of each theme with codes and relevant quotes can be found in Figure 4.1:

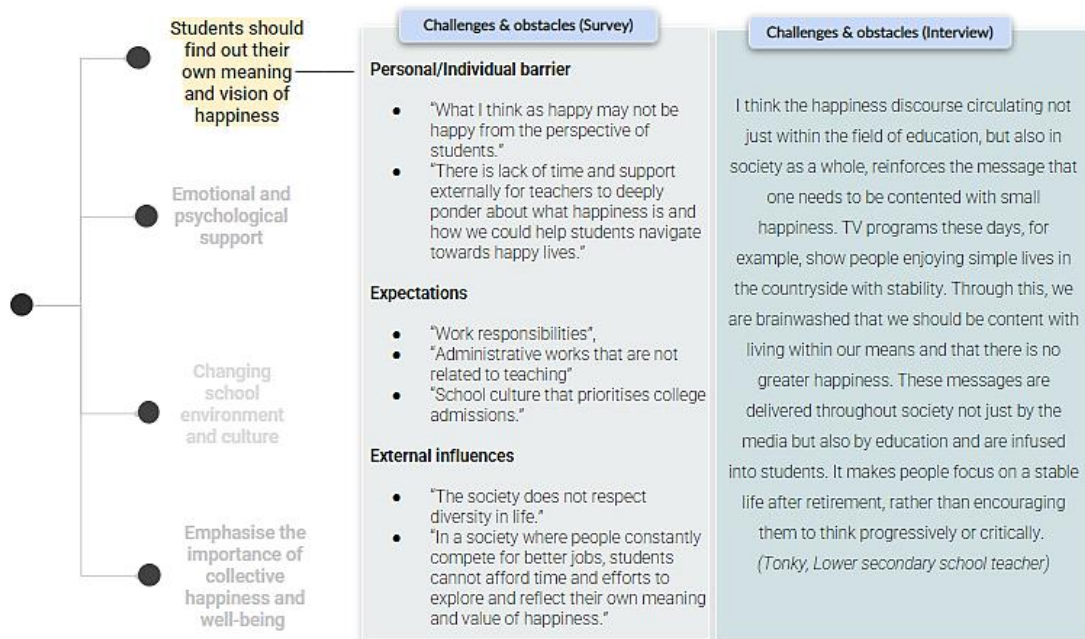


Figure 4.1. A sample mapping of themes, codes, and quotes

After all documentary data were coded, I re-read all the initial highlighted codes to identify whether there are differences between the two levels of actors in how they understand students' well-being and happiness.

The final stage of Braun and Clarke's (2013) thematic analysis is report production. As I began writing up my data chapters as per the research questions one and two (i.e., **Chapters 5 and 6**), I continuously had to review not just the recurrent and tailored themes and codes identified in earlier phases but also to cross-check their validity and patterns by comparing with my research notes and informal memos. This is what I call a reflective process; during this phase, I had opportunities to consult my themes and codes with my supervisors and other colleagues during the monthly tutorials, as well as at the conferences where I presented my findings.

Similar steps have been taken for oral materials. All the oral materials were transcribed ad verbatim. Each of the transcripts was carefully read several times while making annotations of keywords and ideas in the margins. These transcripts were then imported into the Nvivo software and went through the same thematic coding process. The analysis of OECD video clips, however, was performed in tandem with the OECD documentary materials after being transcribed. The findings were also presented and discussed together in **Chapter 5**. On the

other hand, interviews with policy intermediaries in Korea (**Chapter 6**) were analysed separately from national education policy reports. These interviews largely reflect policy intermediary actors' perception and evaluation of HEP reform over the past decade and, hence, require a latent approach to interpret the meanings in relation to their sociocultural context and structural conditions. Finally, interviews with school-level actors, such as school leaders and teachers, were analysed and discussed as gross data in **Chapter 7**; these interviews were analysed as a continuum of school-level actor questionnaires, the process of which is described at length in the following section.

Quantitative data analysis

Quantitative data analysis is often understood as an analysis of a large volume of data. The collated school-level actor questionnaire ($n=50$) was explored and analysed using SPSS software. The collected responses were treated as gross data, regardless of the respondents' geographical locations, job positions or number of years in teaching. There were two reasons for not distinguishing the units of analysis: first, although the total sample size was more than the conventional 'minimum' size of thirty (Cohen et al., 2018), the total size of 50 respondents still lacks sufficient statistical power for comparison between different variables. Second, the main purpose of conducting the online questionnaire was to use the questionnaire as a channel to recruit potential interviewees and to gather their brief thoughts on students' well-being and happiness, which would allow in-depth conversation during the interview based on their questionnaire responses. In other words, the data collected from the questionnaire were only used to understand respondents' cognitions regarding the aims of education and their day-to-day responsibility and contribution to students' happiness.

The reason for selecting the SPSS software is that it allows different interrogation of data, such as through t-test, ANOVA, regression analysis, factor analysis and reliability test. Compared to other statistical packages such as R or Stata, SPSS is known to be much easier for beginners in statistics, particularly with its user-friendly interface. The decision was based on personal convenience as well since I already had several SPSS guidebooks in my possession.

The questionnaire – apart from the demographics and open-ended questions – was designed on an ordinal scale, specifically using a Likert scale. As mentioned above, the second part of the questionnaire asked the respondents about their perceived relative significance of different aims of education, of which a large majority of questions were adapted from Ashton et al.’s (1975) original survey. Hence, along with other questions, the first step of analysis sought to confirm whether respondents completed the questionnaire with honesty, and also ‘whether those who fail to return their questionnaires would have given the same distribution of answers as did the returnees’ (Cohen et al., 2018, p. 277).

The reliability of responses was evaluated using Cronbach's alpha (coefficient ranging from 0 to 1). The analysis revealed that the reliability coefficient of 40 questions on ‘Aims of education’ (Part 2) was 0.968. Considering that an alpha value between 0.7 and 0.9 indicates satisfactory and a value higher than 0.9 as excellent consistency (Cohen et al., 2018; Demir et al., 2016), it is safe to make a judgement that Part 2 questions are highly reliable. In addition to this comprehensive reliability coefficient, I evaluated the internal consistencies in each of the five developmental aspects of educational aims (i.e., intellectual, physical, aesthetic, emotional and personal, and social and moral aims) to ensure their reliability. The results are as below (**Table 4.3**):

Table 4.3. Reliability of questionnaire measured by Cronbach’s Alpha

Aspect(s) of Development	Number of Questions	Cronbach’s Alpha
Intellectual Development	11	0.901
Physical Development	3	0.918
Aesthetic Development	3	0.846
Emotional and Personal Development	14	0.919
Social and Moral Development	9	0.924

The reliability test on ‘Linking Happiness to Day-to-day Lives’ (Part 3) questions also indicated a reliability coefficient of 0.805 with one item removed after being identified as unreliable.

4.5 Methodological limitations and challenges

As briefly mentioned in the earlier sections, with the outbreak of Covid-19 six months into my PhD journey, the already-closed nature of the school community in Korea became even more secluded as the country shut down schools amid the rise in cases. There were a series of methodological frustrations throughout the data collection process, some of which have led to the adoption of a new methodology.

In this research, an online questionnaire played a critical role in recruiting interviewees. When I sought to recruit unit schools, school commissioners or inspectors for a qualitative interview, I found it impossible to contact both unit schools and local education offices, especially when working overseas. For example, there were no work email addresses listed or provided on their websites, and the only information provided to the public was the office landline number. However, contacting and requesting access to these institutions via their work telephone was out of the question, as such an approach is deemed culturally inappropriate. This ‘inappropriateness’ was also confirmed by one of the former Korean teachers who is now also working as an overseas researcher. When I consulted him about contacting these institutions via call, he discouraged me that it is highly unconventional in Korean society to reach out via landline work telephone and that it may also involve a risk of imposing a burden on the shoulders of the recipients. I was also advised that requests for school access would hardly be heard nor accepted – especially amidst the pandemic – without having a good network with someone who holds some power within local education offices (or school leaders in the case of unit schools).

As such, I decided to circulate the survey through open Facebook school communities (e.g., teacher associations and research groups for school-level actors). However, such an approach turned out to be ineffective as well. I contacted a total of three public groups, each of which had more than 10k members (Group 1), 7k members (Group 2), and 700 members (Group 3). These groups were chosen because they had great relevance to the topic of my research. Before posting the survey advertisement, I contacted the administrator of each group for their permission. The first and third groups thankfully gave me their permission, but unfortunately, only one member responded to the survey. On the other hand, the second group declined my request outright with no explanation of the reasons. Hence, my solution to overcoming the low level of uptake from social media circulation and my lacking internal ties with

authoritative figures in local education offices was to pursue a purposive snowball sampling. With three gatekeepers secured, all of whom are either active members of teacher communities or teacher educators in Korea, this approach proved to be highly effective. There were also occasions where participants, recruited through these gatekeepers, introduced me to their colleagues. As a result, I eventually gathered a total of 50 questionnaire respondents and 10 interview participants.

Second, having less control over choosing the recruitment group resulted in an imbalance in their years of experience, geographical regions, and job positions. Therefore, I could not compare schools from different localities or types of schools (e.g., primary vs upper secondary) or jobs (e.g., teacher vs school leader). For example, a large majority of participants in both the online questionnaire (83.7%) and interviews (90%) were teachers. My solution was to treat the survey responses and interviews as gross data. In addition, semi-structured interviews were used as an extension to questionnaire responses, wherein 10 school-level interview participants were asked to clarify and elaborate on some of the responses they gave in the survey. Not having to classify the respondent to a certain group (e.g., locality, position) has enabled me to acknowledge and present every response as valuable data and avoid hasty generalisations, regardless of their lack of similarity to others.

Throughout the interviews with school-level actors and policy intermediaries, I often felt I was not part of the ‘community’— both school and policy communities. While my age or educational background has not been the topic of discussion in any of the interviews, many automatically guessed my age based on my look and presumed that I am a ‘privileged outsider’ who lacks the knowledge or experience to truly understand what is actually happening in the local sites. Several school-level actors, although not many, also implicitly expressed their antagonistic attitude towards ‘academics’ who have not taught in schools, describing them as ‘obliviousness towards the field [school] reality’. To minimise the effects of my positionality and not disrupt the interview process, I tried my best to dismiss any unrelated personal questions on my identity by responding: (1) that I am conscious of the time; and (2) that I would be happy to converse after the interview. While my initial expectation was that the interviews with policy intermediaries would be much more difficult due to issues of power relations (for pitfalls of elite interviewing, see Richards, 1996), I was surprised to find the experience much smoother than that with school-level actors. Two

possible reasons may explain this: first is the presence of a gatekeeper between myself and the interviewees, and second, the interviewees may have perceived me as a ‘potential colleague’ working in the same field.

More broadly, the Comparative Case Study (CCS) approach, which this study aligns closely with (see **Chapter 1**), is grounded in seeking similarities, differences, or interlinked actions across different case studies or levels of analysis. One of the key assumptions in adopting the CCS approach is that policies travel and arrive at the designated locales (Sakata et al., 2021); the limitation of this research is that it did not have a chance to confirm whether policies are translated into specific practices at the classroom, but that it had to rely on the accounts of the interviewees.

4.6 Ethical considerations

Ethical considerations were present in both qualitative and quantitative research, especially if the research involves personal information and sensitive data. Some of the key ethical problems that emerge in qualitative research include: (1) the researcher/participant relationship; (2) the researcher’s subjectivity and selectivity, especially in the interpretation of data; and lastly, (3) the design of the research (Ramos, 1989). Qualitative researchers who engage and collect data from human participants tend to have less control over the research process due to higher unpredictability (*ibid.*). It is, therefore, important for researchers to be completely aware of the possible hurdles of their research and devise a contingency plan should any obstacles, such as data loss or withdrawal from participation, arise (Arifin, 2018).

While all policy intermediaries granted their permission to be identified, the promise to maintain complete confidentiality of participation turned out to be an important driver for school-level participants. The closed nature of the Korean school community could, again, be found in their concerns about being identified; that is, what they shared during their interviews might cause backlash to their positionality. All interviewees were pseudonymised with their chosen names from their favourite animations, TV shows or movies (which was part of the icebreaking activities at the beginning of every interview) unless they gave explicit consent to reveal their identities. For all pseudonymised interviewees, I have anonymised their gender

as well by using the gender-neutral pronouns ‘they/them’. Also, for the same reason, I have decided to only include a sample interview schedule (see Appendix 5) and a vignette (see Appendix 6) instead of a full actual interview transcript in the Appendices.

All interviewees and survey respondents were informed that their data and transcripts will be kept for research purposes only and that these will be deleted at least five years after they have been analysed. Interviewees were also ensured that these data will be stored in both an encrypted laptop and UCL N-Drive per the institutional protocol. The freedom to withdraw their participation and redact their responses was emphasised three times (1. Information sheet; 2. Consent form; 3. At the beginning of the interview).

4.7 Conclusion

In this chapter, I outlined methodological approaches, data collection processes, challenges I encountered throughout these processes and how I overcame them, and some major ethical considerations. The findings are elaborated with good depth in the following chapters: OECD analysis in **Chapter 5**, Korean HEP analysis in **Chapter 6**, and school-level actor analysis in **Chapter 7**. Then in **Chapter 8**, I will discuss how these findings from each level can be interlinked.

Chapter 5 The OECD's Conceptions of Happiness and Well-being: From learning dispositions to skills for the future economy

5.1 Introduction

This chapter explores how the concepts of 'happiness' and, more generally, 'well-being' emerged and became key signifiers of the OECD's education agenda in the past decade. In recent years, growing interest has been shown in the OECD's progressive shift towards more humanitarian agendas (Li & Auld, 2020; Rappleye et al., 2020). Many of these studies have explored a range of OECD initiatives including, but not limited to, the introduction of 'creativity' in PISA 2022 (Grey & Morris, 2022), the expansion of PISA to low- and middle-income countries through PISA for Development (Auld et al., 2022), and its efforts to contribute to the Sustainable Development Goals (SDGs) (Cobb & Couch, 2022). There is, however, a dearth of studies that situate the OECD's happiness and well-being policy initiatives within the recent phenomenon of the 'humanitarian turn' (Li & Auld, 2020) of the OECD, and this is where this chapter aims to make its contribution.

The guiding questions addressed in this chapter include: (i) what were the core educational beliefs and priorities of the OECD and how have they changed since its inception in the 1960s?; (ii) how do these changing beliefs and priorities explain the emergence of the 'happiness' and 'well-being' agenda both in the general works and in the education agenda of the OECD?; and, lastly, (iii) how, since its first emergence, did the meanings attributed to 'happiness' and 'well-being' change, and why? The argument I develop is that the growing proliferation of the use of the concepts of 'happiness' and 'well-being' needs to be understood not only as part of the OECD's 'humanitarian turn', but also as part of the efforts to (re)align their education agenda with the changing imaginary of the future economy. In doing so, this chapter demonstrates the 'floating' nature of the two concepts and how they have been continuously rearticulated to fit the OECD's broader political and economic visions.

This chapter begins with a historical overview of the education agenda and activities of the OECD between its inception in the 1960s and the present day, particularly focusing on the Organisation's earlier ventures toward 'humanising' education discourses (e.g., Recurrent Education). It demonstrates that these predecessors to well-being and happiness were caught between the two competing paradigms of humanism and global capitalism (Rubenson, 2009),

where the transformative role of the ‘cultural’ domain was eventually overlooked and erased by the dominant political-economic perspective of the OECD (Robertson & Dale, 2015). This section is then followed by an overview of the historical circumstances, which this chapter refers to as a series of ‘spin-offs’, that gave rise to ‘happiness’ discourses within the OECD.

The analysis draws on a corpus of the OECD’s electronic and media resources which include documents (i.e., publications related to PISA and the OECD Future of Education and Skills 2030, country reports, working papers, blogs, press releases), webinar transcripts, and PowerPoint slides created and circulated by the OECD. It traces the emergence and development of ‘happiness’ and ‘well-being’ not only as a measure of progress but also as the goal of the OECD’s educational initiatives (for a full list of data, see Appendix 1). These materials are analysed thematically through an inductive interpretive approach, focusing on the various underpinnings of the two concepts and how they became implicated and embedded into the OECD’s broader futuristic visions of education.

5.2 Historical overview of the OECD and its educational activities

The emergence of the OECD should be understood in line with the geopolitical and ideological tensions that existed in the Western hemisphere in the aftermath of the two World Wars. This section provides a brief overview of why the OECD and its predecessor, the Organisation for European Economic Co-operation (OEEC), were established in the mid-20th century and in what ways they achieved legitimacy in the system of global governance, particularly focusing on the role political-ideological tensions played throughout the process. In understanding how the ‘humanistic’ educational activities of the OECD have emerged and manifested, it is essential to look at the OECD’s historical transition process and how such a transition has had an impact on the OECD’s humanistic agendas and approaches to education. This background of the Organisation illuminates why and how humanistic and often abstract notions emerge as a universal solution to the problems that – according to the OECD – a vast ‘majority’ of countries are ‘assumed’ to be facing. This section, therefore, unravels the interplay between the OECD and the changing geopolitical, economic, and cultural context, most notably the cold war and post-cold war culture, the neoliberal globalisation of the economy, and the rise of the sustainable development discourse.

5.2.1 Historical transition from the OEEC to OECD

By the end of the Second World War, European economies suffered heavily from high unemployment rates, disrupted trade flows, a high number of war refugees, food shortages and from social unrest leading to strikes. Heavily war-torn nations of Europe, such as Germany, underwent a slow recovery with the help of humanitarian support, emergency relief, and foreign interventions for military disarmament (Gareau, 1961; Hogan, 1989). Meanwhile, Britain, France and the U.S. attempted to reach a negotiation with the Soviets to make the German economy self-sufficient, which was soon overturned by the then leader of the Soviet government, Vyacheslav Molotov.

Then, following George C. Marshall's speech in June 1947, which urged for the need to assist Europe in recovering from the aftermath of the two World Wars, the U.S. proposed an initiative to rehabilitate 17 economies of Western and Southern European countries, also known as the Marshall Plan (or formally the European Recovery Program). The Plan pledged to provide financial assistance to these European economies amounting to approximately \$12 billion from 1948 to 1952 under the rationale to modernise European industries and to stop the spread of communism by keeping the Soviets in check. Its initial proposal was to aid all the European countries, even the Soviet Union and the countries that were under their rule; with little surprise, Stalin rejected the invitation to participate in the Marshall Plan, criticising the Plan 'as an example of unmitigated American imperialism' (Agnew & Entrikin, 2004, p. 2). The Soviet Union's rejection to participate in the Plan was subsequently followed by other Eastern blocs countries, such as Poland, Czechoslovakia, and Bulgaria, that were under the control of the Soviets (Clayton, 1963). The Plan was ultimately signed by a total of 16 countries that formed the Committee of European Economic Co-operation, also known as the *Conference of Sixteen*: Austria, Belgium, Denmark, France, Greece, Iceland, Ireland, Italy, Luxembourg, the Netherlands, Norway, Portugal, Sweden, Switzerland, Turkey and the UK.

The signing of the Marshall Plan was soon followed by a convention to establish the Organisation for European Economic Co-operation (OEEC) in 1948 as an organisation to supervise the aid, as well as to work on the European recovery programme. On 16 April 1948, the 16 countries signed the founding Convention of the OEEC; in particular, Article 8 of the Convention stipulated that:

The Contracting Parties will make the fullest and most effective use of their available manpower. They will endeavour to provide full employment for their people and they may have recourse to manpower available in the territory of any other Contracting Party... Generally, the Contracting Parties will cooperate in the progressive reduction of obstacles to the free movement of persons.

This was, in fact, based on the functioning principle of the OEEC as an effective instrument of cross-national cooperation; the stipulation of Article 8 resonated such a principle, whilst promoting the OEEC as the first European intergovernmental organisation ‘to be given a specific mandate to address the issue of manpower migration’ (Rist, 1979, p. 205).

The OEEC’s geopolitical role of distributing financial aid to war-torn Western Bloc countries of Europe laid the groundwork for the soft power tools that the OECD over the past decades has become characterised by (Leimgruber & Schmelzer, 2017, p. 29). The beginning of the 1950s marked the intensification of the Cold War and, particularly in the wake of the Korean War, the changing geopolitical landscape gradually signalled the decline of the legitimacy of the OEEC where countries such as the US and France shifted their focus to either ‘kill the OEEC altogether’ or to strengthen the role of the North Atlantic Treaty Organization (Griffiths, 2009, p. 244). Also, not only the immediate tasks of assisting the Marshall Plan and facilitating the European economic recovery plan were fulfilled to a large extent, but also the role of the OEEC was increasingly overlapping with other organisations, such as the European Economic Community, European Free Trade Association, and North Atlantic Treaty Organization. In other words, the OEEC was faced with a dilemma in defining and legitimising its long-term organisational objectives and goals (Carroll & Kellow, 2011, p. 48). Such an organisational crisis led to the opening up of new roles, such as but not limited to ‘the standardization of international economic statistics’, enabling the OEEC – and, later, the OECD – to become ‘an important site for transatlantic norms production and governance’ (Leimgruber & Schmelzer, 2017, p. 32).

5.2.2 OECD’s early approaches to education: 1960-80s

In April 1960, the Group of Four (France, Germany, UK, and the U.S.) submitted a proposal to reform the OEEC, which laid the groundwork for drafting a Convention on the OECD. Many of their recommendations, such as invalidating all OEEC decisions, received a negative reaction from other member countries (see Griffiths, 2009, pp. 247-249). A total of 20 OEEC nations gathered in May to discuss the Group of 4’s reform proposal, during which an

alternative convention to that of the Group of 4 was formally presented by the Swiss with the support of other member countries including Belgium, Spain, Sweden, and Norway (ibid.). The final Convention on the OECD was signed at the Chateau de la Muette on 14 December 1960. The Convention came into force on 30 September 1961 with the establishment of the OECD retaining the legal personality of the OEEC.

Of particular importance in regard to the establishment of the OECD is its proclamation as having expertise in economic analysis (Carroll & Kellow, 2011). While there is no explicit reference in the 1960 Convention on the OECD to the role of education, Papadopoulos (1994) argues that, within the OECD, there has always been an:

...**inferred role for education**, both for the contribution it can make **to economic growth** and **as means** by which the purposes of such growth, namely an increase in general well-being, can be given reality. (p. 11, my emphasis)

The OECD's earlier approach to education, particularly from the 1960s and throughout the early 1970s, resonates with what Istance (1996) has described as 'the economics of education'. What ignited the spread of 'the economics of education' approach among Western countries was the launch of the Sputnik satellite in 1957 (Elfert, 2019). The so-called 'Sputnik shock', or 'Sputnik crisis', created public anxiety about the perceived technological gap between the U.S. and the Soviet Union and, against that backdrop, education and training were increasingly viewed as 'capital investment' for economic growth (Tröhler, 2013). This anxiety to win the race for 'talent' led to support for 'the large-scale modernisation of the education system based on the core values of modern industrial society' (Haugsbakk, 2013, p. 612).

Both the anxiety of the member countries and the OECD's 'economics of education' approach are well documented in the OECD's convening of both the *Policy Conference on Economic Growth and Investment in Education* in Washington in October 1961 and the follow-up conference *Policy Conference on Highly Qualified Manpower* in Paris in September 1966. One of the speakers in the 1961 Conference stated: 'May I say that, in this context, the fight for education is too important to be left solely to the educators' (OECD, 1961, p. 35 as cited in Tröhler, 2010). Following the 1961 Conference, the OECD set up an educational planning programme termed *The Educational Investment and Planning Programme* in 1962. The Programme believed in the importance of integrating economists in educational planning and

sought to calculate and devise ‘appropriate long-term educational goals for the industrialized OECD member states’ (Bürgi, 2017, p. 293).

Similarly, the report for the follow-up conference began with an introductory statement written by Seymour L. Wolfbein, an American economist who was then working for the US Department of Labour:

... the function of education can be viewed as the process which enables an individual to withstand the inevitable changes which will occur in the relationship between what he learns and what he will be called upon to do in the world of work. Such a definition, with its focus on the individual, argues for the broadest based kind of education so that he attains maximum responsiveness, adaptability, flexibility in the face of manpower, industrial, occupational and technological change. (OECD, 1966, p. 6, original emphasis)

The human capital theory was stressed throughout both reports, which, by its nature, is predominantly an economic theory. The challenges of human capital theory, however, became increasingly evident as the problems of quantitative growth were identified from the mid-1960s onwards. A wide array of social issues, such as overpopulation, environmental destruction, social unrest, and civil society movements, despite seemingly unrelated, were altogether labelled as ‘diseases of prosperity’ (Schmelzer, 2012, p. 1007). Confronted with these challenges, the OECD increasingly turned less optimistic (Bürgi, 2017) and gave rise to a new focus on qualitative growth and welfare, and by the time the OECD established the Centre for Educational Research and Innovation (hereinafter, CERI) in 1967, sociologists comprised the second largest group after the economists (Elfert, 2019).

The beginning of the 1970s was marked by the ‘cosmopolitan vision of global justice [which] emerged as a call for a new social contract’ (Elfert, 2015, p. 89). This idea of a new ‘social contract’ emerged in similar forms across the IOs. UNESCO, for example, advanced the concept of ‘lifelong education’ through the publication of the *Faure Report* in 1972 (Faure et al., 1972) and, two decades later, through the publication of the *Delors Report* (Delors et al., 1996). In parallel, the CERI promoted ‘recurrent education’ through a publication *Recurrent Education: A Strategy for Lifelong Learning* report (OECD CERI, 1973). The concept of recurrent education was predicated as an avenue to narrow the gap between educational opportunities across different age groups. The 1973 report problematised the vagueness of the term ‘lifelong education’ and, instead, stressed that learning should be seen as an individual’s own responsibility and should take place ‘in a recurring way, i.e., in alternation with other activities, principally with work, but also with leisure and retirement’ (ibid., p. 24).

The debate between the notions of ‘education’ and ‘learning’ continued over the following decades; although the OECD’s promotion of the term ‘recurrent education’ declined over time, its narratives sustained and further developed and became the core of its ‘lifelong learning’ narratives in the mid-1990s (Hake, 2015).

While lifelong learning and recurrent education were proposed as remedies for all the social problems, both of them have been susceptible to what Kallen (1979) describes as ‘chameleonic’ translations. Particularly the OECD’s narratives of recurrent education were – despite its seeming divergence from the earlier education-as-investment approach as an ‘all-encompassing’ policy that could resolve not only economic but also social problems – ‘pragmatic’ in nature. Its adoption, for example, was seen as a strategic approach ‘for giving new signification to degrees and certificates...now seen as necessary steps in an educational career that would extend in the course of the lifespan’ (Milana, 2012, p. 110). This, in turn, led to substantial criticism in the 1970s for its break away from humanism (Hager, 1998), in tandem with a political divergence and resistance to the recurrent education proposal across OECD member countries (see Centeno, 2017).

High inflation, cut in public expenditure, and a rapid surge in unemployment following the 1973-1975 recession brought various social inequalities. One of the most urgent problems was a sharp rise in youth unemployment (Henry et al., 2001). This raised concerns towards the short-sightedness of education as a ‘path’ to employment and growth. The member countries subsequently turned towards the OECD, which led to the arrangement of the first OECD Education Ministerial meeting in 1978 (Papadopoulos, 1994, p. 142). Despite the prominence of the social concerns, the two themes that emerged in the 1978 Ministerial meeting and dominated the continued discussion were the ‘school-to-work’ transition policy and vocational education and training, which were predominantly economically-oriented.

The key theme throughout the 1980s was the role of education in dealing with the new dilemmas brought by structural changes, such as persisting youth unemployment and increasing skills mismatch. This raised further questions about the relationship between education and the economy, particularly about the potential contribution of higher education in not only advancing knowledge but also ‘its diffusion to all parts of society’ (OECD Education Committee, 1989). In other words, there was a greater recognition of the ‘leading’

economic role of education, and that educational change ‘was *politically* advocated to respond to the new economic imperative, marked by growing country interdependence and competition in the knowledge economy’ (Papadopoulos, 1994, pp. 170-171). The late 1980s can, therefore, be understood as a phase in which the OECD called for a redefinition of the purpose of education in preparing individuals by, for example, developing and ‘renewing’ their knowledge, skills, and qualifications on which both the economy and society depend.

5.2.3 OECD’s educational approach to knowledge economy and neoliberal globalisation: 1990s-2010s

Moving on to the 1990s the focus of OECD’s education agenda continued to centre around the themes of vocational education, training, and lifelong learning essential for structural transformation from a mature industrial society to a post-industrial knowledge-based society. The emphasis on the importance of equipping with knowledge and information becomes evident in 1996 with the publication of *The Knowledge-based Economy* (OECD, 1996), through which the OECD argued:

Knowledge is now recognised as **the driver of productivity and economic growth**, leading to a new focus on the role of information, technology and learning in economic performance ... Most importantly, new issues and questions are being raised regarding **the implications of the knowledge-based economy for employment and the role of governments** in the development and maintenance of the knowledge base. **Identifying “best practices”** for the knowledge-based economy is a focal point of OECD work in the field of science, technology and industry. (ibid., p. 3, my emphasis)

Two points are worth noting from the passage above. First is the identification of knowledge – in particular, information, science, technology and learning – as the driver of productivity and growth. The report then goes in length to identify the types of knowledge that are of key importance (i.e., ‘scientific knowledge’) in the knowledge-based economy, through which the OECD steers the governments towards taking an active role in ‘upgrading human capital’ through the promotion of specific skills and collaborative networks in the economy for greater transfer of knowledge and technology (ibid., p. 7).

Second is the report’s emphasis on identifying ‘best practices’ through the development of knowledge-based indicators and statistics. The 1990s marked the shift towards the ‘comparative turn’ in the OECD’s education policymaking (Martens, 2007). Unlike the

European Union, the OECD had, and still has, no legal instruments to exercise power over its member countries. Also, unlike the World Bank it does not have financial levers to incentivise countries to undertake the initiatives the OECD promote. The OECD, instead, utilised the growing ‘ranking and rating’ culture ‘[s]pawned by the neoliberal turn and demands for public sector accountability’ (Cooley, 2015, p. 10). Countries became increasingly interested in rational evidence-based policymaking, actively comparing themselves with others in the search for ‘best practices’. While this ranking and rating culture has already been driven by non-governmental organisations, such as Transparency International’s 1995 Corruption Perceptions Index (Martens, 2007), the OECD reconstituted itself as one of the most influential actors in global education governance through the launch of *Education at a Glance* in 1992 and of the triennial student performance survey PISA in 1997.

The origins of the PISA, in particular, can be traced back to 1995, when Andreas Schleicher, the now Director for Education and Skills, proposed ‘a global test’ that countries could use to compare their school performance with that of other countries in his first meeting with other senior education officials at the OECD (Schleicher, 2018). His proposal initially received sceptical responses from other officials that it ‘couldn’t be done, shouldn’t be done, or wasn’t the business of international organisations’ (ibid., p. 18). Nevertheless, Schleicher – with the support from Thomas J. Alexander, then director of the OECD Directorate for Education, Employment, Labour and Social Affairs – successfully persuaded the officials to develop and conduct a pilot study. Since the first main survey taking place in 2000, PISA has primarily focused on measuring 15-year-olds’ knowledge and skills in the subjects of reading, mathematics, and science. As a standardised assessment of student achievement of 15-year-olds, the results and rankings provided by PISA have come to possess ‘a particularly significant weight as an indicator of the success or failure’ (Grek, 2009, p. 26) of a country’s education system and policy, and, therefore, has been at the centre of education policy debates over the past two decades.

5.3 OECD’s new educational gesture: A ‘humanitarian turn’

The late 2000s saw the rise of ‘post-GDP’ discourses and a call for a more comprehensive understanding and measurement of development. Both political awareness and active

international- and national-level efforts to redress the negative consequences of growth and limitations of the GDP began in earnest when then French President Nicolas Sarkozy's voiced concerns towards the problematiques of traditional economic measures, such as GDP and Gross National Product, as the primary yardstick of development. The Commission on the Measurement of Economic Performance and Social Progress, also commonly known as the 'Sarkozy Commission', was formed by Sarkozy in February 2008 with two Nobel laureates Joseph Stiglitz and Amartya Sen, and a renowned French economist Jean-Paul Fitoussi as organisers. The following year, the Sarkozy Commission published its final report, which, in short, firmly argued: (i) the limits of GDP as a measure of economic performance and social progress; and (ii) the importance of recognising well-being as a multidimensional construct, which cannot be fully captured by relying on 'objective' standard-of-living indicators (Stiglitz et al., 2009). The suggestion, therefore, was to incorporate 'subjective' indicators of well-being that could comprehensively capture how individuals experience the betterment of life.

Soon after the release of the 2009 Sarkozy Commission report, the rise of political awareness of the negative consequences of growth and limitations of the GDP was evident across IOs, as well as vis-à-vis national governments, among which four 'spin-offs' require particular attention, although this list could be endless. The 'first spin-off' is the boom of 'post-GDP' discourse and the release of a wide range of new global-level political statements. Notable examples include but are not limited to: the European Commission's release of its Communication *GDP and Beyond: Measuring progress in a changing world* in 2009 through which the search for an adequate measurement of 'quality of life' was urged; the publication of the Sustainable Development Commission's *Prosperity without growth* report in 2009 commissioned by the UK government; and then UK Prime Minister David Cameron's launch of a 'well-being index' in 2010. This 'post-GDP' (or 'beyond GDP') movement slowly spread beyond the Global North – for example, in 2012, ten African states gathered in Gaborone and publicised the 'Gaborone Declaration for Sustainability in Africa' in which the declaration explicitly recognises the problems of GDP as a measure of both well-being and sustainable growth.

The 'second spin-off' consists of a substantial shift in both the OECD's revision of its Vision Statement and the introduction of a new initiative that measures well-being and progress. Celebrating the 50th anniversary in 2011, the OECD replaced the old slogan 'Building

Partnerships for Progress’ with the now-famous ‘Better Policies for Better Lives’. In the same year, the OECD launched the Better Life Initiative (hereinafter, BLI), through which it suggested that the focus on well-being should go beyond the discussion or measurement of ‘current’ well-being and capture how well-being can be sustained over time (Durand, 2015). The key focus of the BLI is building a better evidence base and measures of people’s well-being by capturing various aspects that matter the most to people and the shaping of their lives, which would, in turn, facilitate national policymaking (Durand, 2015; OECD, 2011). Under this initiative, the OECD developed the ‘Better Life Index’ in 2011 which, using 11 specific dimensions that constitute the measurement of both ‘current’ and ‘over-time’ well-being, rank countries according to their overall performance with an equal weighting to each dimension.

The ‘third spin-off’ involves another major IO: the United Nations (UN). Similar to the OECD, the UN also picked up and promoted the importance of well-being and happiness as a new economic paradigm from 2012 onwards. The UN, however, was not the sole actor in this spin-off as Bhutan’s concept of Gross National Happiness (GNH), which was first coined by King Jigme Wangchuck, the Fourth King of Bhutan in 1972, was at the centre of the discussion. Soon after his enthronement, the King pronounced GNH as the guiding philosophy of the country’s development process, denouncing the continued reliance on GDP as an overall measure of progress. With the spread of post-GDP discourses worldwide since the late 2000s, Bhutan spearheaded the UN resolution 65/309 entitled ‘Happiness: towards a holistic approach to development’, which was passed by the UN General Assembly in July 2011. A year later, the UN General Assembly adopted another Resolution 66/281, proclaiming 20 March as the International Day of Happiness. This also led to the launch of the World Happiness Report under the UN Sustainable Development Solutions Network (UNSDSN). My interview with an associate editor and founding member of the World Happiness Report revealed that, despite the expansive collaboration between the UNSDSN and the OECD, their approach to well-being vastly differed:

I think the OECD is standing in the middle. They are still combining both objective and subjective measures like they do in their Better Life Index. They cover many aspects of our life – more broadly than Human Development Index – like everything is important. It tells you what is going on across countries in each of the indicators...It is kind of different from our [World Happiness Report] standard.

Objective measures of happiness and well-being are, of course, important. But we don't place too much emphasis on them because we believe all those kinds of indicators will somehow be represented by SWB measures.

For example, if a road is very bad and your happiness is affected by it, we can somehow capture this kind of material well-being aspects through measurements of SWB. But maybe we have gone too far away from them [OECD]...We are on this kind of extreme [by putting emphasis on SWB], while there are those who focus on material well-being...and there is OECD in between the two camps. (Interviewee #1, 25/02/2021)

In terms of their use of the term 'happiness' itself, the interviewee acknowledged that the World Happiness Report uses the term 'happiness' as an umbrella term for subjective well-being.

Because if we say SWB, the public wouldn't understand what you are talking about. So we named our report 'World Happiness Report', instead of 'World Subjective Well-being Report'. Even if the public doesn't know the exact definition, they would know what you are talking about. (Interviewee #1, op. cit.)

In other words, the interchanging use of the terms 'happiness' and 'well-being', presumably not just within the UN but also the OECD, can be seen as a strategic marketing approach. The public-friendliness of the term 'happiness', for example, is effective in drawing the attention of governments and the media, as well as their political appetite for action.

The final 'fourth spin-off', arguably, bears the most significance over the past decade: the launch of the Education 2030 Sustainable Development Agenda and the Sustainable Development Goals (SDGs). While the idea of 'sustainable development' is nothing new with its first appearance dating back to the late 1980s when the UN published the famous Brundtland Report, it was formally embedded in the global education agenda through the proposal of the Education 2030 and the Framework for Action at the World Education Forum in Incheon, South Korea in May 2015. The framework later became part of the SDGs as Goal 4 set by the UN in September 2015. SDG 4 shifted the emphasis from access to 'quality' education that is inclusive and equitable for 'all' learners. In particular, the Goal affirmed the global commitment to address the various 'learning gaps' (e.g., gender gap, equity gap, funding gap, etc) and improve the quality of education in developing countries

While the United Nations Educational, Scientific and Cultural Organisation (UNESCO) became the lead agent for SDG 4, the OECD, on the other hand, lacked the legitimate authority to monitor the progress of SDG 4 (Li & Morris, 2022). In the 2015 OECD Ministerial Council Meeting, the OECD Ministers voiced their support for promoting the

OECD's contribution to the 2030 Agenda (OECD, 2015a). The following year, it published an Action Plan for the SDGs through which it lists a range of ways in which the Organisation can support and contribute to the achievement of the SDGs (OECD, 2016a). The two most notable among the list of specific actions in relation to education were: (i) the OECD's strong data and evidence base for education gathered and developed from PISA, PIAAC (Programme for the International Assessment of Adult Competencies), and TALIS (Teaching and Learning International Survey); and (ii) its large country and regional coverage, particularly through its recent expansion of PISA to developing countries through the PISA for Development initiative. Through these actions, the OECD sought to promote the PISA instruments as a global metric and, in so doing, establish its role as the 'monitor' of the progress of SDG 4 (Addey, 2017). The OECD's increasing reliance on humanitarian discourses oriented towards 'human rights', 'equality', 'global citizenship', and 'sustainable development' also served its latent purpose of 'rebranding' the Organisation's much-criticised and long-standing logics of human capital and neoliberalism (see also Auld et al., 2019; Li & Auld, 2020).

5.4 'Happiness' and 'well-being': from learning dispositions to skills for the future

If the four spin-offs outlined above represent the *core* events that facilitated the move away from a GDP-centric developmental approach to one that is humanitarian-oriented, the 'fifth spin-off', which first appeared in 2012, would be the OECD's introduction of a 'measurement' of the happiness of 15-year-olds through its PISA survey. This fifth spin-off requires particular attention for two reasons: first, while the OECD took on a humanitarian role by promoting the importance of non-cognitive aspects, such as student happiness and, later, creativity and well-being, the underlying 'reasons' did not deviate too much from its previous – and continuing – emphasis on cognitive domains; and second, its recent attempts to *measure* these non-cognitive domains need to be situated within the OECD's recent 'soft skills' agenda, which lies at the core of its recent 2021 Survey on Social and Emotional Skills.

5.4.1 PISA 2012: Happiness as a learning disposition

While no declassified record exists that details the reasons for the decision, for the first time in PISA 2012, the OECD asked students to evaluate their happiness at school ('I feel happy at school') and satisfaction at school ('I am satisfied with my school'). In particular, the PISA 2012 report emphasises the importance of taking into account students' subjective evaluations of their own happiness as follows:

As schools are *a*, if not *the*, primary social environment for 15-year-olds, these subjective evaluations [of their own happiness] provide a good indication of whether education systems are able to **foster or undermine overall student well-being**. (OECD, 2013, p. 33, my emphasis in bold)

The same statement was reused in the *PISA in Focus* Report (OECD, 2015b), but this report further legitimises the necessity of the new measurements by arguing:

...students' results on the PISA test are correlated with how well students will do later on in life; but **strong performance in standardised assessments like PISA** explains **only so much of future results** in other endeavours. **Success and well-being in life** also depend on how well students have been able to **develop socially and emotionally**. (ibid., p. 1, my emphasis)

As the quote shows, the report tacitly accepts the 'problematique' of its earlier scope of measurement, which was largely confined to the measurement of cognitive outcomes, most notably academic achievement in reading, mathematics, and science.

Two drivers sustained the OECD's rationale to extend its measurement horizon beyond cognitive outcomes. The first driver was the OECD's earlier, albeit inconsistent, attempts to incorporate non-cognitive aspects of student achievement. As early as PISA 2000, the OECD has already shown steady attempts at introducing and comparing the aspects of students' self-beliefs, self-efficacy, and self-concept towards their learning, more specifically towards academic subjects such as reading and mathematics. Then in PISA 2003, the OECD introduced new questions related to students' anxiety and nervousness about facing and learning mathematics, arguing that such dispositions are likely to serve as an emotional and psychological barrier to their effective learning (OECD, 2004). These questions on self-efficacy and self-concept continued in both PISA 2006 and 2009, but the OECD introduced new indices that measure affective dimensions of learning. In PISA 2006, for example, it introduced an index entitled 'Enjoyment of Science' and posited that students' enjoyment of a subject indicates a greater emotional attachment, through which the students would find

more values in learning, which would then, in turn, stimulate their creative problem-solving skills and the motivation to pursue science-related careers (OECD, 2006).

The second, and more profound, driver was the ‘shock effect’ that the results from PISA 2012 brought. The idea of ‘PISA-shock’ – or, mildly, ‘PISA-surprise’ – is a frequent theme in various studies that explore the implications of PISA for national policymaking (see Grek, 2009; Sellar & Lingard, 2013; Waldow, 2009). In the first three rounds of PISA, most of the high-performing education systems were from East Asia. This gave rise to a call to ‘learn from East Asia’; for example, many Western countries, including the UK, and top consultancies like McKinsey identified Japan, Hong Kong and Korea as models for emulation, particularly focusing on their initial teacher training, selective teacher recruitment, or interactive whole-class teaching systems (McKinsey & Company, 2007; P. Morris, 2012).

When the results of students’ subjective evaluation of happiness were published, however, those narratives were undermined. Prior to the publication of PISA 2012, Barry McGaw then OECD Director for Education (1999-2005) frequently praised the performance of East Asian students as follows:

[1] So the best way to develop literacy and numeracy is to have a full and rich curriculum. In Hong Kong they use different forms with different kids in the same class. That’s where we’re heading. (NCEE, 2012)

[2] By the measure of PISA, Korean education is clearly among the very best in the OECD that is something with which Korea can be very well pleased. (McGaw, 2005, p. 13)

[3] The OECD tests what kids can do with the maths they learn, not just memory recall ... The north-east Asian countries are even further out on top on that test, which assesses recall. (McGaw quoted in Garnaut, 2012, para. 14-15)

PISA 2012, however, painted a different picture when it comes to students’ happiness at school. The result, as shown in Figure 5.1, was shocking for three reasons. First, the majority of East Asian countries – with the exception of Korea which came last – delivered a mediocre performance in ensuring students’ happiness at school. Second, despite being another group of strong PISA performers, even the Nordic countries – particularly Finland being one of the ‘bottom’ performers – were ranked side-by-side with East Asian countries. What perhaps came as the biggest surprise, however, was the fact that all the ‘top 10’ performers’ except Iceland (10th) were ‘developing’ countries.

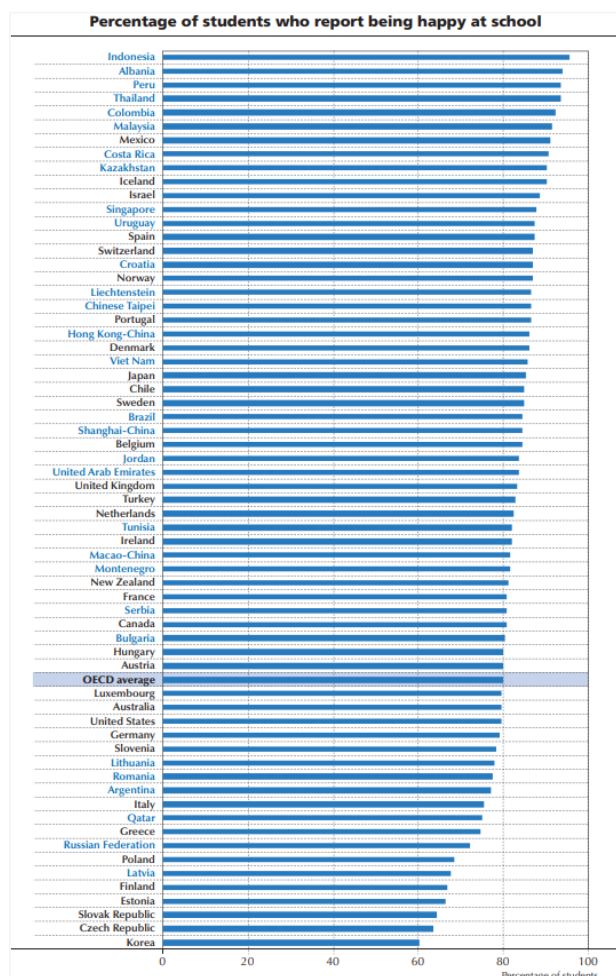


Figure 5.1. Percentage of students who report being happy at school. *Source:* OECD (2013), *PISA 2012 Results: Ready to Learn (Volume III)*

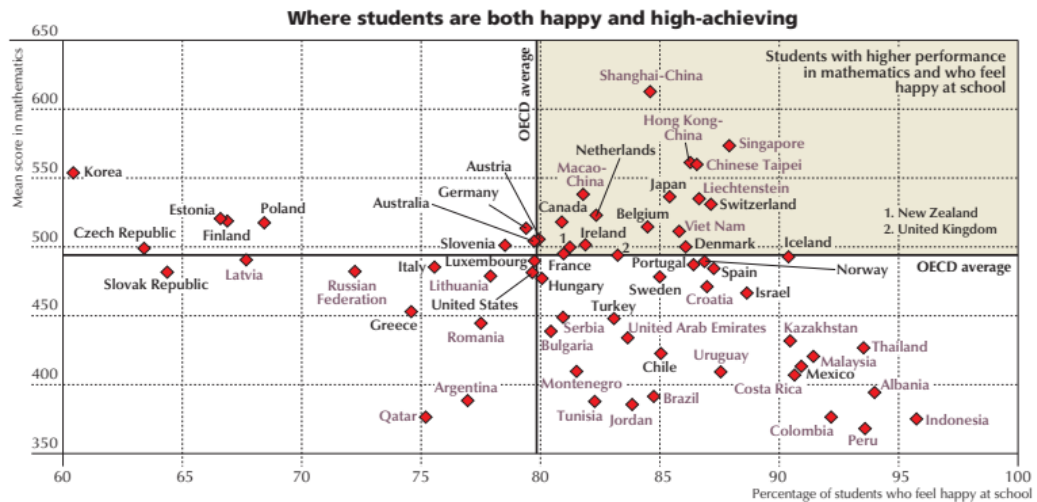
The governance influence of PISA’s happiness measurement was profound. As Schleicher (2018) contended in his autobiography:

The **impact** of PISA was **naturally greatest** when the results revealed that a country performed comparatively poorly...The **biggest outcry** was heard when **test results contradicted the public’s perception** of the education system. (p. 21, my emphasis)

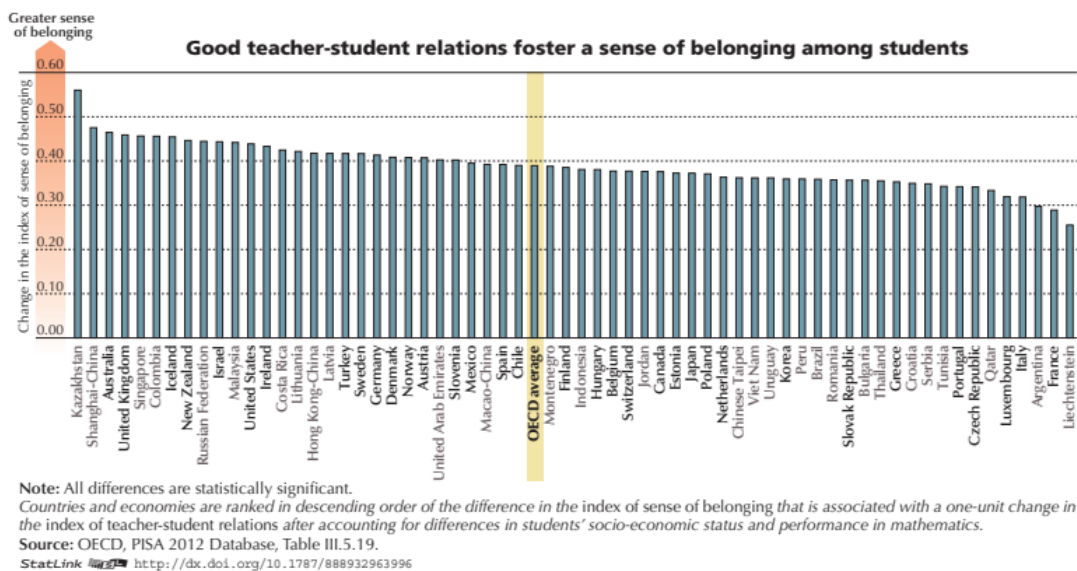
Finland, for example, was shocked as the PISA findings bucked that of the UN’s World Happiness Report 2012, where the country was ranked as the ‘happiest’ country worldwide (Helliwell et al., 2012). What also aggravated the situation was the decline in Finnish students’ performance in all three subject domains in PISA 2012. A couple of years later, under the leadership of the Finnish National Agency of Education, a new ‘National Core Curriculum’ was completed in 2014 and became effective in 2016. One of the key purposes of the curriculum reform was to ‘improve students’ opportunities for experiencing the joy and

meaningfulness of learning’ (Halinen, 2018, p. 80) as a direct response to the concerns expressed by the public and the media (see *The Economist*, 2016). Another good illustrative example is Korea and its government’s explicit reference to its identification as the country with the ‘unhappiest students’ (Figure 5.1). The country’s pride in producing academically successful students turned into humility, eventually legitimising the introduction of controversial and seemingly humanistic policies without strong opposition. These are detailed in more depth in **Chapter 6**.

Also notable are the ways in which these data are presented in the OECD’s PISA 2012 reports and public seminars. The two graphs in Figure 5.2 each illustrate (i) the correlation between students’ performance in mathematics and happiness at school, and (ii) the correlation between teacher-student relations and a sense of belonging among students (OECD, 2015b).



Source: OECD, PISA 2012 Database, Table I.2.3a and Figure III.1.2.
 StatLink <http://dx.doi.org/10.1787/888932935667> • StatLink <http://dx.doi.org/10.1787/888932963787>



Note: All differences are statistically significant.
 Countries and economies are ranked in descending order of the difference in the index of sense of belonging that is associated with a one-unit change in the index of teacher-student relations after accounting for differences in students' socio-economic status and performance in mathematics.
 Source: OECD, PISA 2012 Database, Table III.5.19.
 StatLink <http://dx.doi.org/10.1787/888932963996>

Figure 5.2. PISA in Focus, Source: OECD (2015b), *PISA in Focus 50*

Despite being seemingly disparate, the PISA in Focus report presents two graphs which emphasise the positive correlations between good teacher-student relations and students' performance in mathematics and a sense of belonging in school. What it does not do, however, is provide any explanation of the first graph ('Where students are both happy and high-achieving'). While the coordinate plane presents no visible correlation between the students' feeling of happiness at school and their performance in mathematics, the OECD turns the readers' attention to the first quadrant by giving a visual emphasis using colour and the heading 'Students with higher performance in mathematics and who feel happy at school'. Although the report ends with the bottom line saying, '[a]cademic achievement that comes at the expense of students' well-being is not a full accomplishment' (ibid., p. 4), questions and

contradictions remain pertinent as it simultaneously turns the attention *away* from the ‘developing’ countries with the ‘happiest’ students to those that have high performing but ‘mediocrely happy’ students. In other words, the key message of the report, albeit delivered indirectly, is an ‘inevitable trade-off’ between student happiness and achievement, whether or not the OECD acknowledges it.

This arbitrary correlation was continuously reinforced even until 2017, when Michael Ward, the Senior Policy Analyst at the OECD, gave a public webinar for the UNESCO International Institute for Educational Planning where he reported:

Do teacher-student relations affect students’ well-being at school? What we [OECD] found is that four out of five students in OECD countries agree or strongly agree **that they feel happy at school that they feel like belonging at school**, and [that] teacher-student relations are strongly associated with both performance in mathematics, student happiness, and sense of belonging at school. (Ward, 2017, n.p., my emphasis)

The OECD’s use of a single-item measure of students’ evaluation of happiness at school is problematic in many ways. As stated earlier, the overarching narrative that the OECD employed to introduce the ‘happiness’ question was to understand ‘whether education systems are able to foster or undermine overall student well-being’ (OECD, 2013a, p. 33). Hence, even if the question itself may not have been intended to be used as a stand-alone measure of student well-being (Clarke, 2020), in both PISA 2012 and PISA in Focus reports, the OECD repeatedly uses the notions ‘happiness at school’, ‘social and emotional development of students’, ‘social and emotional well-being’, ‘student well-being’ in a chameleon-like manner (OECD, 2013a, 2015b).

While the OECD’s attempt to measure students’ happiness at school can be situated within the Organisation’s broader efforts to broaden ‘what PISA *can* measure’, what was also excluded in its discussion was students’ subjective and experienced well-being *outside* the school environment, including, but not limited to, students’ social and familial relationship beyond the school circle. Indeed, many studies have explored the relationship between student well-being – albeit their definitions varied widely – and different non-school variables, such as parent involvement (Belle, 1999; Usher & Kober, 2012), out-of-school relationships (Eklund & Roman, 2017), and the number of hours spent sleeping (Lo et al., 2018). These discussions were, however, largely absent in PISA 2012’s conceptualisation and measurement of happiness.

5.4.2 PISA 2015: Laying the groundwork to build technical expertise

By the time the PISA 2015 main survey began in March 2015, it became clear that the OECD was aware of the ‘problematiques’ of (i) asking students to evaluate their feeling of happiness at school; and (ii) using the notions of ‘happiness’ and ‘well-being’ synonymously. Prior to the release of PISA 2015, in September 2016, a working paper entitled *A Framework for the Analysis of Student Well-Being in the PISA 2015 Study: Being 15 in 2015* was released (Borgonovi & Pál, 2016). The paper began by emphasising the importance of student well-being for education policy and explained:

[1] In 2015, PISA went even further than assessing subject-specific problem-solving competencies...more importantly...**asked students about their experience as teenagers: the struggles they face, their future expectations, how they relate to their peers, parents and teachers, and their satisfaction with their life as a whole.** As such, PISA 2015 provides **one of the most comprehensive portraits of students’ well-being around the world to date.** (ibid., p. 7, my emphasis)

[2] Over the past decade, there has been **growing interest in students’ well-being** and in comparing countries, not only in terms of how well students fare academically, but also in how well education systems promote **students’ overall development and quality of life.** (ibid., my emphasis)

The two extracts above are a powerful illustration of what Li and Morris (2022) referred to as the OECD’s way of ‘creat[ing] legitimacy in an arena where it had not been previously involved’ (p. 14). The first extract describes PISA 2015’s student well-being measurement as ‘one of the most comprehensive portraits’ (Borgonovi & Pál, 2016, p. 7). To put it differently, on one hand, by describing the ‘measurable’ constructs and indicators selected by the OECD and its international test development team as ‘comprehensive’, the discussion of the aspects of student well-being that are *unmeasurable* – or difficult to be measured – gets marginalised. On the other hand, those aspects that can be ‘measured’ and compared by PISA, such as life satisfaction, schoolwork-related anxiety, and expectation of further education, are prioritised and situated at the fore, shaping and (re)framing the policy discussion.

Furthermore, the working paper highlighted the multidimensional nature of student well-being, and claimed that the following five specific domains are captured in PISA 2015: 1) *cognitive well-being* (e.g., subject-specific skill/competencies and students’ self-beliefs in science); 2) *psychological well-being* (e.g., life satisfaction and self-reported psychological functioning); 3) *social well-being* (e.g., sense of belonging at school, social learning experiences, relationship with teachers, peers and parents); 4) *physical well-being* (e.g.,

physical activities and eating habits); and 5) *material well-being* (e.g., household environment, human and material resources at school, extracurricular activities at school) (Borgonovi & Pál, 2016, p. 10).

However, in the actual PISA 2015 report, the fifth domain proposed by Borgonovi and Pál (2016), ‘material well-being’, was omitted from its definition of student well-being: ‘the psychological, cognitive, social and physical functioning and capabilities that students need to live a happy and fulfilling life’ (OECD, 2017a, p. 61). In fact, the discussion of material well-being was largely excluded in the final PISA 2015 report, and the reasons for such an omission were left unexplained. Perhaps the most likely reasons would be the following:

[1] Even if PISA 2015 was **not designed to provide complete coverage of all the dimensions of students’ well-being**, the student-level data in PISA can shed light on different manifestations of students’ well-being both across and within countries. (OECD, 2017a, p. 60, my emphasis)

[2] Although PISA 2015 contains instruments to measure several aspects of well-being, it **remains first and foremost a study of adolescents’ cognitive skills**. (ibid., p. 64, my emphasis)

By stating that the report does not intend to provide ‘complete coverage’ of different dimensions of student well-being, the OECD may avoid criticism of being selective in terms of what they measure. It was also notable that when it comes to the issues of ‘coverage’ and ‘policy usefulness’, the OECD rather stepped back; this was particularly evident in the second quote, wherein the ‘first and foremost’ purpose of PISA as a study of 15-years-olds’ cognitive skills was rearticulated. The narrative was rehearsed in different parts of the report as well – for example, by stating that PISA 2015:

...**does not provide a ranking** that shows which countries are most successful in promoting students’ wellbeing. **For such a ranking to be useful for policy**, it should be based on **a complete accounting** of students’ functioning and capabilities across all four dimensions of well-being. PISA 2015 **measures some dimensions of well-being better than others** ... PISA 2015 provides **only limited information** on the physical and mental health or emotional states of students, on how students spend their time, and how satisfied they are with different aspects of their lives. (OECD, 2017a, p. 64, my emphasis)

Nonetheless, unlike how the PISA 2012 mainly focused on students’ happiness (i.e., social and emotional well-being) at school, the conceptual framing of well-being can be said to have widened in PISA 2015 with inclusions of evaluative, psychological, and social aspects of well-being questions. Some of the examples are shown in Figure 5.3 below.

Self-evaluation of well-being (Life satisfaction through Cantril ladder)

The following question asks how satisfied you feel about your life, on a scale from "0" to "10". Zero means you feel 'not at all satisfied' and "10" means 'completely satisfied'.

ST016

Overall, how satisfied are you with your life as a whole these days?

Psychological aspects of well-being
(Performance related anxiety, achievement motivation, students' career and educational expectations)

ST119 To what extent do you disagree or agree with the following statements about yourself?
(Please select one response in each row.)

		Strongly disagree	Disagree	Agree	Strongly agree
ST119Q01NA	I want top grades in most or all of my courses.	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄
ST119Q02NA	I want to be able to select from among the best opportunities available when I graduate.	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄
ST119Q03NA	I want to be the best, whatever I do.	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄
ST119Q04NA	I see myself as an ambitious person.	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄
ST119Q05NA	I want to be one of the best students in my class.	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄

ST114 What kind of job do you expect to have when you are about 30 years old?
(Please type in the job title.) _____

Figure 5.3. Sample questions on subjective well-being in PISA 2015, *Source:* OECD (2014a), *Student Questionnaire for PISA 2015*

The two working paper extracts provided earlier in this sub-section also imply that the OECD's decision to measure student well-being was driven by a 'growing interest' – presumably among governments – and demand to understand the state of student well-being and to compare with others. As Auld and Morris (2016) also argued, in order to respond to the demand for 'evidence', it is crucial for the OECD draw on its credentials and technical expertise. The efforts to relate their well-established technical expertise in measuring academic achievements with students' well-being can be found in the main PISA 2015 report (OECD, 2017a):

[1] While there is **a growing body of research** on the topic, **only a few** large-scale studies of adolescents have taken **a comprehensive view of well-being**...It is **now important to develop international data** that extend beyond the study of adolescents' disorders, deficits and disabilities, and that **put more emphasis on** the positive attributes that define the success of students. (p. 60, my emphasis)

[2] PISA **holds a unique advantage over other studies** in that well-being indicators **can be related directly to the academic achievement of students** across a large number of economies. (ibid., my emphasis)

Somewhat contradicting the earlier passiveness towards its imbalanced accounting of different aspects of student well-being, the report strongly emphasised PISA's 'selling point': its technical expertise in measuring students' academic achievement. The OECD stressed that unlike either the studies which only focus on adolescents' well-being or those national indicators that narrowly focus on children's mental and physical health, PISA 2015 could provide: international (and comparable) data that (i) is conceptually comprehensive, and (ii) can be used as 'potential' variables to explain the variability of students' academic achievement.

Furthermore, PISA 2015 employs several references to both internal and external sources for their legitimacy in measuring student well-being. Two notable examples illustrated across PISA 2015 working paper and the main report are: (i) the Stiglitz Commission ('first spin-off'); and (ii) the OECD's BLI, particularly its guidelines on measuring subjective-wellbeing ('second spin-off') (Borgonovi & Pál, 2016; OECD, 2017a). Concrete examples of these references can be found in the following extracts:

[1] Because the focus of PISA is on students' well-being, the outcomes discussed in this paper differ from those identified by the **Sen, Stiglitz and Fitoussi (SSF)** and adopted by **the OECD in its Better Life Initiative**. However, the five dimensions identified map closely onto the SSF. (Borgonovi & Pál, 2016, p. 8, my emphasis)

[2] This multidimensional approach to students' well-being is **well aligned with the one used in the OECD's Better Life Initiative**...by bringing together students' **academic performance** with **what they think about the quality of their lives both in and outside school**. (ibid., my emphasis)

[3] This definition of well-being combines a **"children's rights approach"**, that emphasises the right of all children to have a **happy life "here and now"**, with a **"development approach"**, that underscores the importance of students **developing the skills to improve their well-being in the present and in the future** (Ben-Arieh et al., 2013). (OECD, 2017a, pp. 61-62, my emphasis)

By comparing and differentiating PISA's measurement of student well-being and the works of the Stiglitz Commission and the BLI, the OECD strategically aligns with both the global movement towards well-being and the OECD's normative commitment to its institutional mission statement: *Better policies for better lives*.

This has several implications from the policy point of view: first, PISA 2015's alignment with both external and internal well-being initiatives strengthens the promotion of student well-being as a multidimensional composite, while to some extent distancing itself from PISA

2012's reliance on happiness as the overarching indicator of student well-being. Yet, the OECD hardly explains why other dimensions identified by both the Stiglitz Commission and the BLI, such as environmental well-being and community and civic engagement, were omitted from the assessment. Second, by stating that PISA 2015's definition of well-being integrates the focus on the 'developmental approach' into the children's rights approach, the OECD emphasises the importance of developing *specific* skills that are important for students' both *present* and *future* well-being.

5.4.3 Post-2015: 'Skillifying' happiness and well-being to prepare for the 'imagined crisis'

The skills that PISA 2015 was referring to became clearer in the OECD's recent education initiatives. With the aim to prepare students for the unprecedented social, environmental, and economic challenges, the OECD Education Policy Committee agreed to launch *The Future of Education and Skills 2030* (hereinafter, Education 2030) project in 2015. The project began by revisiting the relevance of the competence framework identified in the OECD's earlier project *Definition and Selection of Competencies: Theoretical and Conceptual Foundations* (DeSeCo). While the DeSeCo framework formed the theoretical basis of earlier PISA's conceptualisation of what knowledge, attitudes, and values are important for students (OECD, 2009), Dominique Simon Rychen, the former director of the DeSeCo project, argues that although some of the key competencies remain relevant 'the DeSeCo competence framework needs to be taken forward and refined' (OECD, 2016b, p. 2). The Education 2030 project, therefore, aimed to build on the DeSeCo framework and to identify the types of competencies today's students need to contribute to, and be successful in, the future society (OECD, 2019b).

Central to the reasons that the OECD laid out to justify the revision of the competency framework has been the idea of an 'imagined crisis'. The predictions of potential crises are justified by involving a high degree of uncertainty, where a vast array of potential and uncertain crisis scenarios are presented to the audience, such as the following:

In the face of an **increasingly volatile, uncertain, complex and ambiguous world**, education can make the difference as to whether people **embrace the challenges** they are confronted with **or whether they are defeated by them**. And in an era characterised by a new explosion of scientific knowledge **and a growing array of complex societal problems**, it is appropriate

that curricula should continue to evolve, perhaps **in radical way**. (OECD, 2018b, p. 2, my emphasis)

By conveying a warning message that, unless the education system makes (radical) changes to its curricular, they run the danger of people getting ‘defeated’ by the unprecedented challenges posed by the complex world, the OECD ‘discursively amalgamat[es] the real and the imaginary’ (Krzyżanowski, 2019, p. 465).

What underpins the nature of the OECD’s global governance is the attempt to identify, manage, and solve common problems collectively at the international level (Chidozie & Oluwatobi, 2017). A plausible construction of a ‘causal story’, in particular, serves as a strong leverage for proposing a ‘good diagnosis’ and different *alternative* futures (Alaily-Mattar et al., 2014; Verger, 2012). As Alaily-Mattar et al. (2014) described, the proposals and vision for alternative futures ‘serve as consistent story boards, against which public authorities can continuously check the effectiveness and consistency of their decisions’ (p. 687). In the Education 2030 project, the OECD’s imagination of an alternative future is straightforward. The extracts such as below are present throughout the project documents:

[1] The OECD is committed to **redefine the growth narrative to put the “well-being” at the centre of our efforts** ... Education has a huge role to play in advancing the well-being agenda for individuals and for societies. How can education systems help to **develop competencies** towards both **better future both for themselves and for our common goods?** (OECD, 2016c, p. 4, original & my emphasis)

[2] [The Education 2030 project] supports the wider goals of education and provides points of orientation towards **the future we want**: individual and collective well-being. (OECD, 2019b, p. 20, my emphasis)

[3] Even though there may be many different visions of the future we want, the well-being of society is **a shared destination**. (ibid., p. 129, my emphasis)

Two points are worth highlighting. First, the documents deliver a sense of assertive confidence in knowing and pinpointing the precise future ‘we’ want and that the OECD can provide ‘points of orientation’ towards the very future. In other words, the points of orientation – or policy prescriptions – that the OECD provides through the Education 2030 project can be justified on the grounds of responding to the ‘demands’ of the future society. Second, while erasing the presence of its economic agenda, the OECD promotes ‘individual and collective well-being’ as the *alternative* ‘shared’ vision of the future, but without providing a straightforward definition of well-being. It is also notable that the vision of ‘individual and collective well-being’ is framed in terms of the OECD’s commitment (‘to

redefine the growth narrative'), collective demand ('the future we want', 'a shared destination'), and the idea of the 'common good'.

The idea of the 'common good' requires particular attention. In 2015, UNESCO published the report, *Rethinking Education: Towards a global common good?*, through which it emphasised the importance of moving beyond focusing on traditional competencies, such as literacy and numeracy, towards embracing a humanist vision that considers knowledge and education as 'global common goods' (UNESCO, 2015). What is emphasised in this humanist vision is a sense of 'collective solidarity' and 'responsibility' that exist among the members of a society. As such, the report calls for a 'rethinking of citizenship education in a diverse and interconnected world' (ibid., p. 65).

A similar narrative can be found in the OECD's Education 2030 project. The OECD proposes three 'transformative competencies' that are essential for students to thrive in 2030: (i) creating new value; (ii) reconciling tensions and dilemmas; and (iii) taking responsibility. While OECD (2019b) argues that these competencies are important both for the sake of individuals' own education and life and for the sake of well-being of others, the 'economic importance' of the competencies also occupies a central position across the project documents, often articulated through the terms like 'creativity', 'innovation', and 'entrepreneurship'. The following extract is a representative example:

These competencies are needed more...in economies where the impact of new technologies **requires new levels of skills and human understanding**. Jobs that require **creative intelligence** are **less likely to be automated** in the next couple of decades (Berger, T. and Frey, B., 2015). Reconciling tensions and dilemmas requires reading and understanding complex and ambiguous contexts – **a skill that, to date, cannot be easily programmed into an algorithm**. Similarly **AI does not (yet) have a will of its own, nor a sense of ethics**, and so cannot make the kinds of ethical decisions **responsible citizens** do. Students will need to be able to use their ability to consider the moral and ethical implications of their actions to, among many other things, ensure that **the great and growing power of artificial intelligence is used to the benefit of all people**. (ibid., p. 62, my emphasis).

Then, in order to drive the future education agenda and appeal to national governments, policymakers, and other audiences, the OECD frames these competencies as the way societies can be prepared and able to mitigate the 'imagined crises' in an unpredictable future. Such a framing technique can be observed in the following extracts from the report (OECD, 2019b):

[1] How can we prepare students for **jobs that have not yet been created**, to tackle **societal challenges that we cannot yet imagine**, and to **use technologies that have not yet been invented**? (p. 5, my emphasis)

[2] The future, by definition, is **unpredictable**; but **by being attuned** to some of the trends now sweeping across the world (OECD, 2019) **we can learn – and help our children learn – to adapt to, thrive in and even shape whatever the future holds**. (ibid., my emphasis)

[3] ...with a growing wave of **“fake news” and digital technologies** transforming traditional news media, there are growing demands for schools to develop students’ **media literacy**...With the explosion of **“start-up” culture, and the corresponding disruption to traditional workforce models and professional pathways**, there are growing calls for students to develop their **entrepreneurial skills**. And in a world increasingly **scarred by terror attacks and threats to civilian life and peace**, the need for students to develop **global competencies**, including empathy, tolerance and respect for others, is urgent. Indeed, **promoting peace and sustainable development through education** is now enshrined in the United Nations Sustainable Development Goal (SDG) Target 4.7. (p. 52, my emphasis)

What is visible across these, and also earlier, extracts is a wide use of anticipatory narratives (Guston, 2014; Robertson, 2022). Not only the notion of ‘anticipation’ became central to the OECD’s learning framework entitled ‘Learning Compass 2030’ to stress the importance of an iterative learning process (‘Anticipation-Action-Reflection’ cycle), the extracts also reflect the OECD’s experimentation with ‘new anticipatory devices’ as ways to orient the course of action (Robertson, 2022, p. 200).

While the Education 2030 project argued that its intention was ‘to expand the notion of “what gets measured gets treasured” to “what does not get measured also gets treasured”’ by valuing student agency, empathy, and a sense of responsibility (OECD, 2019b, p. 130), it should be noted that the very competencies that were categorised as the latter – for example, ‘exercising agency’, ‘taking responsibility’, and ‘showing empathy’ – soon appeared in PISA 2018’s Global Competence assessment. In fact, the OECD’s initiative to develop a measure of global competence already began in 2013 when Fernando Reimers, the Ford Foundation Professor of the Practice in International Education and Director of the Global Education Innovation Initiative at Harvard University, submitted a proposal to the PISA Governing Board on assessing global competence (Robertson, 2021). While the OECD’s conceptualisation of ‘global competence’ shifted over time (see Auld & Morris, 2019), increasingly deviating from that of other IOs (see Engel et al., 2019), in its final definition in the PISA Global Competence framework, the OECD (2018c) includes direct references to ‘collective well-being’ and ‘sustainable development’. Then in the final report published in 2020, ‘taking action for

collective well-being and sustainable development’ is described as the fourth dimension of global competence, which focuses on:

young people’s role as active and responsible members of society and refers to their readiness to respond to a given local, global or intercultural issue or situation. Students proficient in this dimension are willing and able to take informed, reflective action. (OECD, 2020, p. 140)

The meanings associated with collective well-being and sustainable development largely oriented around: energy consumption, environmental protection, gender equality, taking actions through ethical shopping, boycotts and petitions, and being engaged through social networks. This shows that the OECD’s objective to partake in SDG 4 contributed to a substantial broadening of its conceptualisation of well-being in and through education, particularly as opposed to its earlier narrow focus on ‘student happiness’. Also, unlike the Education 2030’s humanistic promise to *treasure what is not measured*, the OECD’s continuous attempts to expand its measurement schemata reveal that the mentality of *what gets – and can be – measured gets treasured* is still deeply entrenched at the heart of the OECD.

If the Education 2030 project’s concept of ‘collective well-being’ is largely associated with PISA 2018 Global Competence assessment, what it meant by ‘individual well-being’ as the goal of education can be found in two other initiatives: (1) PISA 2018’s optional Student Well-being Questionnaire; and (2) Survey on Social and Emotional Skills. In the 39th PISA Governing Board meeting, Andreas Schleicher proposed to introduce the Student Well-being Questionnaire as a new international optional questionnaire (Schleicher, 2015). Similar to PISA 2015, the focus of the Student Well-being Questionnaire centred around the experienced well-being of students. While both PISA 2015 and PISA 2018 offered a multidimensional approach of well-being that consists of ‘objective’ and ‘subjective’ indicators, a substantial difference between the two is that PISA 2018 sought to broaden the conceptualisation and measurement of subjective well-being (OECD, 2019c, 2019d). Not only PISA 2018 moved beyond the reliance on a single instrument of the Cantril Ladder’s life satisfaction (Komatsu & Rappleye, 2021), but it also introduced a series of new components, such as affective/emotional well-being using references to ‘*eudaimonic* well-being’, ‘flourishing’, and ‘*hedonic* well-being’, and dimensions beyond school environment (i.e., self, out-of-school environment) (OECD, 2019c, 2019d).

The explanatory logic behind the introduction of Student Well-being Questionnaire was different from the earlier PISA 2012 and 2015 surveys. The proposal situates the importance of student well-being within the OECD's broader Education 2030 vision and provides three reasons why promoting and measuring student well-being is of policy importance:

[1] As with other citizens, the well-being of children is an important policy consideration in itself. People spend approximately a quarter of their lives as children, so **well-being in childhood comprises an important part of overall population well-being**. (Schleicher, 2015, p. 15, my emphasis)

[2] ...it is an important determinant of adult wellbeing. This perspective places particular emphasis on **the accumulation of human capital and social skills that will be important in determining adult outcomes for the student**. This view of the importance of student well-being has been described as "**well-becoming**" (OECD, 2009). The policy perspective here evaluates interventions that affect student well-being in terms of a **social investment that will generate a return in terms of the future well-being of the population**. (ibid., pp. 15-16, my emphasis)

[3] ...it is a crucial driver of **the educational outcomes of students in the present**. In this way, student well-being is of instrumental importance because of its implications for education policy. (ibid., p. 16, my emphasis)

While the idea of student well-being was also promoted in the earlier PISA 2012 and 2015 surveys as an important determinant of other educational outcomes (e.g., school performance, educational attainment) of students, it becomes more clear in PISA 2018 Student Well-being Questionnaire that the students' well-being is now considered as an area of 'investment' in human capital.

What is striking about this 'investment' narrative is the shift of focus from 'hard skills' to 'soft skills' with more explicit reference to changing labour market needs and economic success. In September 2021, the Microsoft hosted an international launching event of the first results from the OECD *Survey on Social and Emotional Skills* (hereinafter, SSES). The event began with a welcome message from OECD's Deputy Secretary-General Ulrik Vestergaard Knudsen, who explained why the OECD has taken the time to collect the Social and Emotional Skills data and praised the timeliness of the SSES:

The Covid-19 Pandemic has stressed every part of our societies, including – or perhaps especially – education system. Testimonials from students all over the world tell us that the emotional strain was enormous, and many felt overwhelmed, and **perhaps underprepared to face these challenges**. The crisis has underscored that traditional cognitive skills **are not enough** to thrive in a complex world. **Students need support to develop their social and emotional capacity, particularly as the world we live in does become more and more**

complicated. This is the driving reason why the OECD undertook this study (Knudsen, 2021, my emphasis).

Despite the fact that the SSES was launched prior to the outbreak of the Covid-19 pandemic, Covid-19 was mentioned several times not only during the webinar, but also in the main report and the OECD blog posts (OECD, 2021; Feldmárová, 2022). The urgency of the development of students' social and emotional skills is then extended beyond the immediate crisis brought by the pandemic to the changes in the labour market. Both Ulrik and the Education Director, Andreas Schleicher, repeatedly emphasised throughout the event how much these social and emotional skills are 'valued' by employers:

[1] We looked at self-management, stress resistance, optimism, open-mindedness, curiosity, creativity, and social skills. We also looked at the related outcomes such as achievement, motivation, and self-efficacy. **We know that employers greatly value such skills.** (Schleicher, 2021, my emphasis)

[2] Some people say we will not do justice to social and emotional skills by measuring them, but I believe the perfect is often the enemy of the good. **What is not measured will not be improved** ... I would like to see the future to be academic skills, social and emotional skills, and learning in the digital world, and the same for national metrics and exams. **Employers would agree with this.** This is not a barrier. It is very much how academic institutions are resisting that kind of change. I do think we just need a better measurement of this. That is my personal bias, but it is important. (ibid., my emphasis)

[3] It is the social and emotional skills that will be essential to helping young people respond more ably to the 21st century. **Employers in highly competitive companies have long been aware of the potential of these skills to make a difference** ... Jobs that require creativity and [social and emotional] skills that are perhaps more difficult to replicate. These will become **essential as automation continues to revolutionise the workplace.** Or look at resilience or optimism. Neither are traditional skills taught in school, but both **make it easier to cope with difficulties, such as social immobility or job insecurities.** (Knudsen, 2021, my emphasis)

These statements fundamentally underpin what I consider as the *latent* purpose of the OECD's decade-long 'happiness' and 'well-being' saga. Despite the ambiguities in – and the 'floating nature' of – their meanings, the notions of student happiness, life satisfaction, and individual and collective well-being have increasingly been used as 'humanitarian frames'. Whilst the use of such humanitarian frames may, to some extent, prevent the criticisms directed towards the OECD for focusing narrowly on human capital development, it is also clear that these frames merely serve as 'stepping stones' for the OECD to expand and consolidate its role and authority in the field of education policy.

5.5 Conclusion

There has been a wide range of extant literature that revealed that global agencies, such as the European Union, OECD, and World Bank, continued to promote their human capital ideals in the guise of humanistic and humanitarian movements (Barros, 2012; Li & Auld, 2020; Jones, 2007). This chapter traced the historical development of the OECD and its approaches to education. It devoted considerable attention to the OECD's recent ventures towards humanitarian efforts to highlight that the introduction of the notions of 'happiness' and, more generally, 'well-being' needs to be understood as part of the OECD's long-term objective to reposition and extend its role beyond the narrow measurement and expertise of cognitive skills. The ideas of student happiness and well-being initially emerged as indicators that could: (i) explain the academic performance variations across the participating countries; and (ii) broaden the OECD's self-proclaimed spectrum of 'what can be measured' and 'what can be treasured'. The inclusion of these non-cognitive educational outcomes, in particular, supports the OECD Directorate for Education's earlier commitment to 'provide a strong evidence base for international comparisons of all aspects of education systems' (OECD, 2010, p. 4).

While the gradual inclusion of such non-cognitive domains of learning outcomes from student happiness in PISA 2012 to the measurement of 'soft skills' in SSES can be interpreted as 'the maturation of the Organisation's humanitarian approach' (Li & Auld, 2020, p. 513), what should not be overlooked in the discussion is the implications of the OECD's ultimate branding of 'individual and collective-wellbeing' as the *alternative* 'future we want' (OECD, 2019b). This chapter demonstrated that by conflating the broader outcome of education of 'individual and collective well-being' with the outcome of equipping 'globally competent' individuals, the OECD has validated its narrow conception and assessment of global competency via PISA assessments, as well as of 'soft skills' via SSES, without evoking strong opposition. In other words, the absence of universally agreed definition and taxonomy of the terms 'happiness' and 'well-being' opened up the room for the OECD to use them as token terms to serve two purposes: first, to search for a rationale to proactively promote its stance on 'what is not measured will not be improved' (Schleicher, 2021); and second, to reposition and consolidate its role and legitimacy in the face of, initially, the 'beyond-GDP' movement through the promotion of the OECD's technical-rational expertise in well-being, and later,

the sustainable development agenda by situating its measurement schemata at the centre of the SDG 4.

The following chapter explores how Korean state officials and policymakers picked up the term ‘happiness’ and presented it as a semantic antidote to the growing social concerns around low growth, socioeconomic inequalities, and cutthroat competition in education. In particular, it demonstrates that the country’s poor performance in the OECD PISA’s student happiness and well-being dimensions became a source of legitimacy for the two major political parties to pursue a ‘humanitarian turn’ in their proposals for education.

Chapter 6 Happiness Education in South Korea: Building ‘happy human capital’

‘South Korea’s good PISA scores so far are the result of pushing children into excessive competition for private tutoring, which is tantamount to child abuse.’ (Superintendent of the Seoul Metropolitan Office of Education Cho Hee-yeon quoted in S. Park, 2017)

6.1 Introduction

This chapter addresses RQ2 (*How and why was Happiness Education Policy promoted in South Korea and what conception of happiness did it embody?*) by examining how the term ‘happiness’ appeared and soon became a central motif of education policies since the early 2010s. It explores a wide array of political, economic, and sociocultural issues that shaped the formation and development of the policy narratives surrounding the notions of ‘happiness’ and ‘happiness education’, and identifies and unpacks the meanings attributed to, and associated with, these notions.

The chapter focuses on the two governments in Korea: (i) the right-wing New Frontier Party (NFP) government (2013-2017) led by the then President Park Geun-hye, and (ii) the left-wing Democratic Party of Korea (DPK) (2017-2022) led by then President Moon Jae-in. As illustrated in **Chapter 4**, the analysis draws on official state-level documents, including print and online documents (e.g., policy reports, annual ministerial plans, curriculum reform documents, and press releases) from the Ministry of Education (hereinafter, MOE) and any other relevant ministries, National Planning Committee, and government-funded research institutions (for the full list of data, see Appendix 1). These documents are analysed thematically through an inductive interpretive approach to identify any emergent themes that shed light on what conception(s) of happiness are embodied and why. While this chapter quotes several newspaper sources, the polarity of the Korean media did not affect the analysis of this chapter as these sources only reported the full transcripts of presidential speeches with no further comments from the journalists.

This chapter consists of five sections. It first provides a brief overview of the nature of party politics in Korea. The second section outlines the backdrop to the emergence of the notion of ‘happiness’ as a presidential campaign slogan in 2012, particularly focusing on the public reaction to the preceding Lee Myung-bak conservative government’s (2008-2013) education

and economic policies, and on the role which ‘global metrics’, such as the OECD PISA and the UN World Happiness Report, played as benchmarks for the HEP. The third and fourth sections unpack the meanings attributed to the notion of happiness and the ideological underpinnings of the right-wing NFP government (2013-2017) and the left-wing DPK government (2017-2022). Lastly, in the fifth section, the findings from the previous sections are drawn together and compared with the responses gained from the interviews with four policy intermediaries in Korea, through which it examines policy intermediaries’ perception and interpretation of why and how the term ‘happiness’ gained political popularity and why it became a floating signifier.

6.2 Brief overview of party politics in Korea

While many works in political science have looked at the disruptive – and even transformative – impact of globalisation on national politics (see Azmanova, 2011; Gorssman & Sauger, 2019), the left-right division continues to ‘serve as a powerful device in both national and cross-national explanations of political behaviour, both at mass and elite levels’ (Mair, 2009, p. 219), as well in mobilising public support for policy actions (Dalton & Klingemann, 2009). The labels of ‘left’ and ‘right’, therefore, have widely been used in Western and liberal democracies, including Japan, as cues for the political preferences of individuals, political opinion formation, policy positions, and even vote decisions (Jou, 2011).

The origins of the left-right division can be traced back to the French National Assembly during the French revolution of 1789 (Bar-On, 2014). Those who supported the revolution, in favour of equality for all, sat on the left of the president, whereas those who supported the king sat on his right. The seating arrangement continued even after the French National Assembly was replaced by, first, the Legislative Assembly in 1791, and soon after by the National Convention in 1792. The nature of the left-right division, both in terms of the strength of division and dispositions associated with each, has altered over time and across nations. Across modern liberal countries, support for traditional values and conformity tends to motivate a ‘right’ orientation, whereas values of egalitarianism and benevolence explain a ‘left’ orientation. Left- and right-wingers also vary in their understanding of the role of the government. Those supporting left-wing ideology show greater support for social welfare

services and government intervention in the economy (Korpi & Palme, 2003), as well as stronger ‘opposition to the interests of financial elites’ (Gozgor, 2022, p. 230). On the other hand, those who support right-wing ideology support market-oriented policies and lower government intervention (Bennett et al., 2023). This value-orientation linkage also appears to be weaker across the post-communist countries compared to liberal countries with a tradition of liberal democracy and welfare state systems or traditional countries with a strong influence of religion in political discourses (Piurko et al., 2011). The left-right division, however, has been widely criticised as an ‘amorphous vessel’ containing meanings that are adapted according to the political and economic conditions in each society (Huber & Inglehart, 1995, p. 90). Also the YouGov survey conducted in the UK in 2019 revealed that individuals do not hold consistent left- or right-outlook and described party loyalties as ‘in flux’ (M. Smith, 2019).

Likewise, the left-right division in political ideologies and party politics in Korea is different from what is conventionally understood in the European tradition. Similar to Japan and Taiwan, the post-independence political division in Korea was shaped by foreign policies, economic ideologies, and national identity issues that emerged during the country’s move to democratisation (Y.-S. Chang, 2008; T. Kim, 2023; J. Shim, 2020). Two factors are worth noting; the first is the country’s distinctive sociocultural interpretations of the ideologies of ‘liberalism’ and ‘communitarianism’ (Lee & Moon, 2006). Liberalism in Korea was institutionalised initially through the continuity of the influence of Christianity (T. Kim, 2023), and later from ‘above’ under the influence of the U.S. Army Military Government in Korea in the late 1940s. James Earnest Fisher (1886-1989) first came to Korea in 1919 as a missionary and scholar, where he actively propagated John Dewey’s ideas of democracy and education until 1934 (ibid.). Later during the U.S. military occupation (1945-1948), in 1946, Fisher returned to Korea as a U.S. Army Military Government in Korea official and advisor to political education, and became actively involved in ‘disseminating a specific vision of the democratic way of life...that was widely shared by Americans and a segment of elite Koreans in the immediate post-liberation period’ (An, 2020, pp. 132-133), which later led to the institution of a multi-party system, freedom of the press, protest and association, universal suffrage, and the rule of law (Im, 2006). Gradually, liberalism became deeply entrenched in the mindset of the Korean people, where any ‘damage to the institutions meant damage to liberal democracy itself’ (Lee & Moon, 2006, p. 193); the democratic movement against the

dictatorship of Park Chung-Hee, for example, was triggered by the motive to ‘defend’ the constitution.

Second, similar to many other countries, the left-right division in Korean party politics is muddled. While the terms ‘progressive’ and ‘conservative’ are used interchangeably with ‘left-wing’ and ‘right-wing’ respectively, they do not necessarily mean the same as the classic ‘left-right’ spectrum used in most Western political systems (Hix & Jun, 2009). What is arguably the ‘real’ determinant of the ‘progressive-conservative’ and ‘left-right’ divisions is the party’s socioeconomic stance and policy towards North Korea and, oftentimes, Japan (ibid.). The ‘conservative’ right-wing end of the political spectrum in Korea largely supports the following: pro-*chaebol* (conglomerates), anti-communism, pro-U.S.-Korea Alliance, whereas the ‘progressive’ left-wing end tends to support the redistribution of wealth, keeping *chaebols* in check, as well as more lenient policies towards North Korea (e.g., the ‘Sunshine’ Policy) and China (see also T. Kim, 2023, p. 136). There is also a strong left-wing nationalist and anti-imperialist sentiment, hence criticising the strong U.S. presence (e.g., United States Forces Korea) as well as the legacies of Japanese colonialism (Steinberg & Shin, 2006). For consistency, this thesis uses the terms ‘left-wing’ and ‘right-wing’ to refer to each of the two political parties, alongside their names (e.g., left-wing DPK; right-wing NFP).

6.3 The rise of ‘happiness’ discourses in the early 2010s

There are both bright and dark sides of Korea’s ‘education fever’. Over the past two decades, the country has consistently ranked as one of the top performing countries in major international large-scale assessments, namely the PISA and the TIMSS. The achievement, however, also came at the cost of students’ well-being, which as Superintendent Cho above also argued, is marked by the students’ psychological distress driven by excessive competition for college entrance exams, cram schools, and long hours of studying, not to mention the highest suicide rate among the OECD countries (M. J. Kim, 2022).

The country’s roots of the education fever, especially what is termed the ‘testocracy’, can be found in the cultural history of Korea, particularly in its influence from Confucian tradition during the *Goryeo* Dynasty (918-1392) (Kwon et al., 2017). As early as 958 CE, a rigorous

national civil service examination (*gwageo*) was implemented to recruit government officials through meritocracy. Over the next centuries, despite its evolution under the *Joseon* dynasty (1392-1910), what remained the same was the use of high-stakes assessment as a primary route for ‘most’ individuals – although the lowest classes such as slaves, shamans, butchers, and children of the remarried women were forbidden to take the exam – to secure a position in the state bureaucracy and obtain social esteem (P.-S. Shim, 2005; Yang & Tan, 2019).

However, in order to understand why happiness emerged as the 2012 presidential campaign slogan and eventually the overarching national policy slogan, it is necessary to unpack what happened prior to the 2012 presidential election and how this shaped the distinctive meanings attributed to happiness by each political party. In the following sub-section, this thesis provides an exposition of the circumstances which gave rise to the ‘happiness discourse’ in Korea.

As illustrated in **Chapter 5**, the beginning of the 21st century was marked by an emphasis on happiness and, generally, well-being as measures of progress (Easterlin, 2001; Layard, 2009), with at least five different ‘spin-offs’ to date (see **Chapter 5**). While there has been an increasing number of studies exploring how the national results and rankings from the OECD’s comparative metrics, such as the PISA, are framed in different societies (Grey & Morris, 2018; Waldow et al., 2014), there have been only a few studies that examine how these metrics serve as a leverage for countries to mobilise political support (Bamberger & Kim, 2022).

The comparative metrics produced by the OECD, in particular, played a substantial role in generating anxieties about Korea’s underperformance in the global ‘happiness’ rankings. During the ‘second spin-off’, the OECD launched a new set of comparative metrics called the ‘Better Life Index’ in 2011, through which the countries can understand and compare their performance in economic and social progress relative to others. Similar to how the UNSDSN used the term ‘happiness’ as an umbrella term for subjective well-being, the Better Life Index has been referred to in the OECD press releases as ‘Happiness Index’ and ‘Quality of Life Index’ (OECD, 2012). When the results of the Better Life Index were disseminated in 2011, there was a high news coverage in the Korean media focusing on the country’s position in the global ranking:

OECD 행복지수 출범, 한국 평균 이하 (The launch of OECD Happiness Index: Korea is below average – S. Kim, 2011)

한국의 행복지수 OECD 중 32 위... 여전히 후진국 수준 (Korea ranks 32nd in Happiness Index among OECD countries... Still at the level of developing countries' – Hwang, 2012)

While the first headline simply describes Korea's performance on the OECD Happiness Index as below the OECD average, the second headline retains a more provocative sentiment. It equates the level of happiness with that of development and, in so doing, instigates concern by framing 'unhappiness' as a particular characteristic rampant among developing countries.

This chapter suggests that Korea's underperformance in the global 'happiness' rankings and the anxieties it brought should be understood as a 'problem stream', as Kingdon (2011) puts it, which soon merged with the 'political' and 'policy' streams, opening up a policy window and creating opportunities for agenda change (see also Baek, 2021).

In 2008, the right-wing Grand National Party (GNP; *Hannara-dang*) candidate Lee Myung-bak (2008-2013) took office as the President of Korea, marking an end of a decade-long period of a left-wing government. As a former businessman, Lee described himself as 'not a believer in ideology but in pragmatism' (Kihl, 2009, p. 242), and put the task of economic invigoration as his first priority. This involved maintaining collaborative relations with conglomerates (*chaebols*), policies that cut maximum corporate taxes from 25 to 20 per cent to spur investment, and ease restrictions on foreign investment. As the 2008-9 global financial crisis broke out following the collapse of Lehman Brothers, the level of state intervention in the economy expanded. Lee's government set up the so-called 'War Room' in an underground bunker of the Blue House, where they centrally collected information and coordinated public financial institutions, such as the Bank of Korea (S.-y. Moon, 2009). Lee also argued for the importance of providing an enabling environment for *chaebols* to survive and compete in the global competitive market and lifted the restrictions on the total amount of shareholding by conglomerates (*chuljja chongaek jehan*) (Jung, 2020; Kalinowski, 2009). The government promoted the relaxation of the separation of industrial and financial capital (*geumsan bulri*), allowing *chaebols* to own up to 9% of a bank stock (Jung, 2020).

Lee's pro-*chaebol* approach was soon described as a 'new developmentalist' model, wherein 'the voice of *chaebol* came to prevail under the tacit submission of conservative bureaucrats, judges, prosecutors, and journalists to conglomerate business interests' (K.-S. Chang, 2012,

p. 33). At the core of this new developmentalist model was the state's identification of new 'engines' for economic growth and an active promotion of government-business collaboration (S.-Y. Kim, 2019). The government pursued a selective use of industrial policies to 'strategically target new green growth engine industries' (H.-K. Kwon, 2021, p. 399) in the name of the 'Green New Deal' project. By the end of 2012, the public showed a strong distrust towards Lee's right-wing GNP government and its pro-*chaebol* economic policies, which were blamed for exacerbating the socioeconomic polarisation and inequalities of wealth and income. Despite the government's call for social responsibility and balanced growth, the policies introduced continued to follow a neoliberalist track with an emphasis on markets, competition and efficiency.

The public's rising dissatisfaction with the government's economic approach was coupled with a series of political scandals. Lee's first Cabinet, for example, faced fierce criticisms – 13 out of a total of 15 nominated ministerial candidates were involved in allegations of ethical lapses (C.-i. Moon, 2009). Also in the summer of 2008, a series of massive protests against (re)opening the Korean beef market to the U.S. broke out, wherein Lee, without any public consultation, lifted the ban on beef imports in April 2008, which had been in place since the outbreak of mad cow disease in 2003. This prompted an anti-government movement in the form of candlelight vigils, which resulted in a serious legitimacy crisis for the Lee government (Um et al., 2014).

While the country's aspiration and support for education – often referred to as the 'education fever' – served as a driving force behind the country's success in ILSAs, excessive pressure placed on students was seen to contribute to their lower levels of well-being (Yoon & Järvinen, 2016). However, the Lee government's guiding principles of choice and competition were followed by the introduction of a wide range of market-oriented initiatives underscoring creativity, decentralisation, autonomy, national competitiveness, and deregulation (R. Kim, 2007). These policies were largely driven by economic-oriented motives with frequent reference to the objectives to win the 'war for talent', for example, by strengthening entrepreneurial education and promoting English immersion in public schools. In particular, Lee strongly believed in English as 'a tool for individuals to gain a competitive edge, as well as for the nation' (T.-H. Choi, 2021, p. 9). The government's proposal to teach the English Language subject in English at upper secondary school level by 2010, however,

faced strong opposition from school-level actors, such as parents and teachers, and was eventually abandoned.

Some of the policies implemented under the Lee government include: (i) giving full autonomy to universities in selecting their students; (ii) building World Class Universities; (iii) establishing 300 government-subsidised elite schools and encouraging active competition between schools (also known as the ‘school diversification policy’); and (iv) ‘No Student Below Basic Level (Zero Plan)’ policy and the revival of the National Assessment of Educational Achievement (hereinafter, NAEA). The reintroduction of a test-based accountability policy called the NAEA was heavily influenced by the U.S.’s No Child Left Behind act. NAEA is a national evaluation system that was introduced to all schools in 2008. It was administered every year to evaluate the academic progress of Grades 6, 9, and 11 students, wherein the results served as a performance indicator for the government to allocate its non-compensatory grant to local education offices and their priority poor performing ‘at-risk’ schools. The decrease in the number of under-achieving students also served as an important indicator for appraising school principals (J. Kim & T. Kim, 2013). The NAEA invoked fierce tension between the MOE, Metropolitan and Provincial Offices of Education, and school-level actors, particularly regarding the right of schools to refuse to participate in NAEA. Progressive superintendents and school-level actors criticised the NAEA for increasing accountability on schools and that such a high-stake uniform test where schools are evaluated and subsequently ranked according to their test outcomes exacerbates the competition- and test-oriented educational culture, which in return, would subject underachieving students to longer study hours (e.g., after school tutoring, private tutoring) and, ultimately, poorer well-being (Cha, 2016).

All these public dissatisfactions were soon translated into a low public approval rating, which, by the end of Lee’s presidential term in 2012, fell to approximately 20%. Against this backdrop, it was timely and crucial for the right-wing party to reinstate the party’s legitimacy to remain in power. In December 2011, following the rapid fall in the approval rating of Lee’s GNP and its defeat in the 2011 Seoul Mayoral by-election, the party formed an Emergency Response Commission appointing Park Geun-hye, the daughter of the former military ruler Park Chung-hee and the leader of the GNP from 2004 to 2006, as the chairperson (The Government of the Republic of Korea, 2013a). Soon after her appointment, Park gave a New

Year speech, where she stressed the phrase ‘happiness of the people’ seeking to reclaim the trust of the public:

Korea has achieved growth in the process of overcoming the financial crisis, but **the warmth [of growth]** has not been well spread to the people of the nation. I believe that the most important goal of the policy should **now be the happiness of the people. What is the meaning of growth when people are not happy? We will change the policy paradigm** so that **the happiness of the people becomes the competitiveness of the nation.** We will **break away from the quantitative growth paradigm** and implement new policies to drive qualitative development. (Park quoted in J. Kim, 2012, para. 3, my emphasis)

This extract shows Park’s (indirect) criticism towards the Lee government for failing to improve people’s lives and to tackle their ‘unhappiness’ and anxieties about the future. In other words, despite belonging to the same party, Park drew a clear line between Lee’s GNP and her Commission. The Commission then promised that the party will undertake a major revision in both its political manifesto and policy priorities (Cho, 2012). The following month, in February 2012, saw the renaming of the GNP to the New Frontier Party (NFP; *Saenuri-dang*).

Later in July 2012, the right-wing NFP announced Park as the party’s candidate for the 18th presidential election.² In her announcement of the presidential bid for the 2012 presidential election, Park articulated her plans to tackle the unhappiness of the people:

[1] ...Korean politics today is not a matter of life that is urgent to the people, but rather a political struggle and slander that has nothing to do with the people's livelihood. Politics today is not only failing to make people relax, but also making them worry about security.

[2] The government has been replaced many times, but public anxiety has not been cured. People say this country has developed with economic growth, but their lives did not get better and their happiness did not grow...Above all, a fundamental change is needed where the focus of the management of state affairs shifts from ‘the nation’ to ‘the people’.

[3] In the past, the development of the country led to greater happiness of the people. However, the link between the growth of the country and the improvement of the quality of life of the people is now broken. Every citizen – and their creativity – is important in today’s knowledge-based society and the nation can develop only when they are happy and can fully demonstrate their potential and talents.

[4] For the happiness of our people, I will establish and promote the ‘Fifty Million Citizens’ Happiness Plan’ which combines the three pillars of ‘economic democratisation’, ‘job creation’, and ‘welfare’ ... Just as the Five-Year Economic Development Plan 50 years ago achieved the miracle of industrialisation, we will lay the foundation for the happiness of the

² President Lee Myung-bak completed his presidential tenure in February 2013. In October 2018, he was convicted and sentenced to 15 years on corruption charges. Later in 2020, an appeals court prolonged his sentence by another two years. In 2022, incumbent President Yoon Suk Yeol granted Lee a presidential pardon, cancelling the remaining sentence in jail.

people for the next 50 years through the ‘Fifty Million Citizens’ Happiness Plan’! (Park quoted in *The JoongAng*, 2012)

As the quotes above show, in her presidential campaign, Park established a strategic breakaway from the preceding Lee government, lamenting the failure of the former government in soothing the anxiety – and the ‘unhappiness’ – of their citizens. In turn, Park emphasises both the urgency and the ‘timeliness’ of the ‘Fifty Million Citizens’ Happiness Plan’ (hereinafter, the Happiness Plan).

Among the three pillars of the Happiness Plan – economic democratisation, welfare expansion, and job creation – economic democratisation, in particular, requires particular attention (see M. J. Kim, 2022). The notion of economic democratisation, which was embraced and supported by most left-wing politicians, first appeared in the reformed Constitution of 1987 against the backdrop of the maldistribution of wealth and public dissatisfaction towards economic monopolies (H. S. Kim, 2013; J. H. Lee, 2013). It soon became a phrase associated with greater equity and equality in economic activities (Suh & Kwon, 2014), which, especially with the enthusiasm for political democratisation, was used synonymously with calls for the reduction of the state intervention in the economy (H. Lim, 2010). In response to the popular demand for economic democratisation, the first civilian and right-wing government led by Kim Young-sam adopted the term to promote anti-*chaebol* policies such as the Real Name Financial Transaction System introduced in 1993 (Suh & Kwon, 2014).³ However, in light of increasing financial globalisation, the Kim government’s anti-*chaebol* policies slowly weakened and, to some extent, lost popularity. The *chaebols* argued that the government’s excessive regulation and control over them would negatively affect their global competitiveness against foreign companies, which soon shifted the government’s focus of *chaebol* reform from achieving economic democratisation to promoting global competitiveness (S. Kim, 2007, p. 95). Nevertheless, the overarching idea of economic democratisation remained in the subsequent presidential campaigns, in which usually the left-wing parties called for stronger regulation and restructuring of *chaebols*, a

³ First introduced in 1993, the ‘Real Name Financial Transaction System’ sought to promote economic justice by prohibiting individuals from engaging in financial transactions under false names. It is argued that the system has played a crucial role in ‘making Korean society more transparent and reining in collusive ties between politicians and businessmen’ (K.-h. Yu, 2013, para. 3).

greater separation of business and finance, and further support for small and medium-sized enterprises.

For that reason, when Park identified economic democratisation and also welfare expansion as her pillars of the Happiness Plan in 2012, the political move was regarded as unusual and unprecedented (Doucette & Koo, 2016). It also signalled a closing of the rhetorical gap between the right- and left-wing parties in their economic visions, where little difference was now found between Park (right-wing) and the other two candidates Moon Jae-in (left-wing) and Ahn Cheol-soo (centrist), both of whom also embraced economic democratisation as their campaign slogans. For Park, this meant ‘an appeal to a wider electorate...offer[ing] a clear electoral message and present[ing] itself to the electorate as a united party’ (Shin, 2020, p. 167). The 2012 presidential election, therefore, offers an interesting case where the right-wing NFP, in an attempt to secure party legitimacy and reclaim the trust of the public, shifted its manifesto by taking on what is commonly understood as the stance of the oppositional party. This shift was facilitated and justified without strong opposition through the articulation of the party’s promissory commitment to address the imminent sources of ‘unhappiness’ (e.g., socioeconomic polarisation between the rich and the poor, competition- and university entrance-oriented education culture) and, in so doing, contribute to ‘the happiness of the people’ (*The JoongAng*, 2012). Soon after, in September 2012, the NFP announced the formation of the National Happiness Committee, which consisted of more than 60 members of the National Assembly, academics, research institutes, school and parent representatives and bankers, and was split into 18 divisions, including ‘Economic Democratisation Division’ and ‘Happiness Education Division’ (National Happiness Committee, 2012).

6.4 The introduction of Happiness Education Policies (HEP)

After her election as President, in her inaugural address in February 2013, Park promised to open a new ‘era of people’s happiness’ (korea.kr, 2013). Education was then identified as crucial and fundamental to the success of this new national vision:

[1] We must provide active support for **individuals to maximise their potential through education** and establish a new system that uses **individuals’ capabilities as a stepping stone to national development**. (ibid., n.p., my emphasis)

[2] A **genuine** era of people's happiness will **only come** when more people can enjoy what they learn and love what they do...Our future holds little promise if we continue the same monotonous competition in which **individuals' capabilities are stifled and creativity is lost**. (ibid., my emphasis)

[3] Individuals' dreams and talents will not grow in a society where everything is determined by one's educational background and credentials. We will change our society **from one that values academic backgrounds to a meritocratic one** so that each individual's dreams and talents can bear fruit. (ibid., my emphasis)

With that, soon after her appointment in 2013, Park proposed 'Happiness Education' as a new public K-12 education framework under the slogan 'Happiness Education for All: Creative Talents Shape the Future'. The framework encompassed three visions, where the NFP government promised to: first, 'normalise public education' (to prevent the students from relying on an 'abnormal' amount of shadow education and prerequisite learning); second, to reduce the financial burden on parents and to ensure equitable educational opportunities; and, third, to shift from a credential society to competency-oriented society. The third vision of a 'competency-oriented society' supported the NFP government's understanding of 'competency' as a set of knowledge and skills required to perform the job and its active promotion of the new 'National Competency Standards' system 'in which a person will be able to receive accreditation or certification for demonstrating a certain level of performance in a particular job' (*The Korean Herald*, 2013, para. 2). Park described the National Competency Standards as a system through which 'the young can earn the job they want, not based on their educational background, but because they have the dream, talent and requirements for jobs' (Park quoted in Sohn, 2015, para. 1).

The introduction of 'Happiness Education' was legitimated – and even perceived as timely – with the publication of the PISA 2012 results in December 2013 and the subsequent rise of 'education crisis' narratives that the media generated. As illustrated in **Chapter 5**, the OECD introduced new questions on student happiness and satisfaction at school in its PISA 2012, in which Korea ranked last (60.4%) and second-to-last (65%), respectively (OECD, 2013a, 2014b). Soon after the PISA 2012 results were released, the country's high level of student unhappiness received substantial attention from the Korean media with article headlines as below.

PISA 평가, 아시아 학생 우수하고 행복도 하다는데, 한국만... (PISA results show that Asian students are [academically] excellent and happy except Korea... – J. Kwon, 2013)

‘성적’ 최상·‘흥미’ 최하...한국 학생은 행복하지 않다 (Top in [academic] scores [but] bottom in [academic] interest ... Korean students are unhappy – Yoon, 2013)

The first headline narrows down the range of comparison from OECD member-states to regional neighbours in Asia. The shift of the media’s prior attention from the country’s performance in PISA subject matters to non-cognitive dimensions is also notable, such as in the second headline (‘Top in [academic] scores [but] bottom in [academic] interest ... Korean students are unhappy’). The Korean students’ unhappiness is framed through the sharp contrast between their excellence in academic subjects (i.e., reading, mathematics, and science) and their low levels of academic interest. Such crisis narratives gave the right-wing NFP government the legitimacy to introduce a ‘solution’ or ‘fix’ that would address the ‘unhappiness’ among students. With a reference to the OECD’s PISA 2012 student happiness outcomes, the NFP government diagnosed that the ‘unhappiness’ of the students comes from their high levels of stress, loss of interest in school classes, school violence and juvenile delinquency, and their distrust in schools (J.-S. Kim et al., 2013). The ‘solutions’, therefore, were provided in the form of initiatives such as the ‘(exam) Free Semester Initiative’, ‘activation of physical education’, ‘expansion of “WEE (We+Education+Emotion)” project’, ‘school anti-violence programmes’, ‘comprehensive plan for prevention of child abuse’, and many more.

The NFP government’s Happiness Education discourse was, however, more than a holistic approach to education. The Happiness Education Policies (hereinafter, HEP) involved a wide range of disparate initiatives, such as ‘character education’, ‘student-oriented career planning and strengthening of vocational education’, ‘class size reduction’, and even the ‘cultivation of regional and provincial universities’ (MOE, 2013a). The objectives of the HEP associated initiatives were directly linked to the government’s larger economic goals to drive the country into the so-called ‘creative economy’ – which ‘encourages new technological innovations and a convergence of different industries such as science, information technology (IT) and culture’ (R. K. E. Park, 2016, p. 9).

Particularly notable is the fact that many of the ‘less controversial’ keywords previously employed by the Lee government, such as ‘creativity’ and ‘character’, remained in Park’s HEP reform. The ways in which these keywords were used, however, bear little resemblance to each other. Creativity, for example, was at the heart of the policies – not only education

but also R&D – of the Lee government, where it was strongly believed that only by cultivating ‘global *creative* talents’, would the country become ‘an advanced first-rate country’ (The Government of the Republic of Korea, 2013a, p. 50). The interest in ‘character education’ surfaced much later during the Lee government, prompted by a suicide of a 13-year-old boy who was heavily bullied at school in 2011 (ibid., p. 393). The initiatives introduced subsequently, such as the ‘WEE (We+Education+Emotion)’ project that placed professional counsellors in schools, largely focused on tackling school violence and bullying and supporting students in crisis situations.

Under the Park government, the meanings attributed to both ‘creativity’ and ‘character’ shifted – the latter more than the former – in a way that these notions are better aligned with the broader economic imaginaries of the government. Creativity, for example, was articulated in the MOE’s annual *Major Policies and Plans* reports largely in two, albeit somewhat contradictory, ways:

[1] **Reviving the fundamental value of education:** Society should value individuals’ creativity and character more than their academic backgrounds. (MOE, 2013b, p. 1; original emphasis)

[2] **Responding to declining student population:** Individuals are supported to become a creative talent and lead the creative economy by maximizing their capabilities to nurture dreams and talents. (ibid., original emphasis)

[3] **Responding to the tough job market:** Students are not equipped to meet the job market demand because they are not taught practical skills at school but only theory-based skills. (ibid., original emphasis)

[4] Students’ holistic development is supported by improving the curriculum in a way that can cultivate the creativity and character of students. (MOE, 2015a, p. 8)

On the one hand, along with ‘character’, creativity is something that is more valuable than academic credentials and, as the fourth quote shows, is crucial to the ‘holistic’ development of the students. On the other hand, nurturing creative talents is also depicted as a way to meet the demands of the job market and industry. Creativity is thus understood and promoted as a ‘teachable’ practical skill with which the students can thrive in the future job market and lead the ‘creative economy’.

The ‘creative economy’, in particular, is a phrase that needs further scrutiny. In the late 1990s, following the May 1997 election, Tony Blair’s Labour government established a Creative Industries Task Force so as to recognise the economic value of the arts and culture industries.

In 1998, the Department of Culture, Media and Sport published the first mapping document of the ‘creative industries’ in the UK, the notion of which was widely employed, albeit its loose definition, as an ideological tool to ‘rebrand’ the country as ‘Cool Britannia’ (Gerosa, 2022). Central to the notion is the promissory vision of economic growth; that is, against the gloomy backdrop of the decline of the manufacturing industry, the timely identification of creative industries as the new growth sectors drives the discussion by materialising different possibilities and visions of the creative economy (Garnham, 2005). As Gerosa (2022) put it, the phrase ‘creative economy’ constitutes an *economic imaginary* which, at the surface level, appears transformative as it brings the notion of ‘creativity’ into the economic conversation. The premise behind this imaginary, however, bears little difference from its predecessors such as the knowledge economy and innovation economy, particularly in respect of the reductive nature of the ‘economisation’ of culture (Banks, 2018). Similarly, Moreton (2018) argues that ‘creativity’, as an attractive concept, may ‘mask its instrumental roots as an economic policy’ (p. 327). Scholars such as Wilson and Keil (2008) also argue the possibility of a further division between the ‘privileged’ creative class (i.e., urban elites) and the ‘real’ creative class (i.e., the urban poor).

The ways in which the notion of ‘creative economy’ was defined and advocated under Park’s right-wing NFP government were, to some extent, different from the one advocated by Blair’s Labour government. First, the right-wing NFP government did not literally translate but rather ‘transcreated’ the notion to *changjo gyeongje* (creation economy) instead of *chang-ui gyeongje* (creative economy). The reasons for such a (mis)translation can be found in the government’s broader national vision. Soon after Park’s appointment, the NFP government released a comprehensive report wherein a total of 140 specific national policy tasks were listed, and among them, a total of 20 tasks were allocated to the ‘creative economy’ vision (The Government of the Republic of Korea, 2013b). While a wide range of future growth engines (e.g., Health and AgeTech industries, Aerospace technology, Information and Communication Technology) were addressed and emphasised across the 20 tasks, unlike the Blair government, none addressed the importance of the ‘culture and art industries’. Instead, the primary focus was on converging Information Technology and Software Technology with the country’s mainstream manufacturing industries, such as aerospace, agriculture, and automotive, that are facing the limits to growth, and creating an enabling environment for

start-ups and small and medium-sized enterprises to drive innovation and protect their intellectual property rights.

Similarly, while both ‘creativity’ and ‘creative talents’ appear frequently across the MOE documents under the broader framework of HEP, the use of these notions is often associated with knowledge and skills related to ‘entrepreneurship’ (MOE, 2014a, p. 9) and ‘core competencies of the future talents’ (MOE, 2014b, p. 1). Examples of these knowledge and skills can be found in the quotes below:

[1] ...education that emphasises **core competencies** such as **communication skills, a sense of community, and problem-solving skills** that are suitable for the modern knowledge society. (Koo, 2013, p. 23, my emphasis)

[2] **The course in secondary-industry-oriented specialised high schools** will be reorganised into **a future growth engine-related course** that students like. (MOE, 2013c, p. 12, original emphasis)

[3] Talent who possesses **humanistic imagination** and **creativity in science and technology**. (MOE, 2014b, p. 22, my emphasis)

Interestingly, the same knowledge and skills listed in the first quote appeared during the introduction of ‘character education’ (*The JoongAng*, 2013), as well as of the ‘Character Education Promotion Law (2015)’ (*EduNews*, 2016). In fact, having a ‘good character’ is alluded in the MOE’s (2017a) annual plan report, which specifies the plan to develop ‘competencies required by the future society, such as computational thinking, creative and convergent thinking, and human character and sensitivity’ (p. 15). Furthermore, when it comes to the future growth engine-related courses, the MOE (2013c) report provides an example of a school based in the city of Daejeon, which introduced two software-related courses, named ‘embedded software’ and ‘software computing’ courses. The discussion of ‘future competencies’ appears in earnest in the MOE’s (2017a) report, wherein notions such ‘the Fourth Industrial Revolution’ and ‘creative talent powerhouse’ are explicitly used (p. 6). The report also directly cites the renowned economist and the founder of the World Economic Forum, Klaus Schwab, and argues for the importance of fostering future core competencies, such as creativity and convergent thinking, and in nurturing and securing talented individuals and creative research outcomes (ibid.).

The aspirational promise of enabling each student to nurture their dreams and talent in the name of ‘happiness’ also further legitimated many of the more controversial policies – for example, the operation of ‘Specialised High Schools (SHSs)’. Unlike their initial conceptions

as schools for students who are ‘talented’ in certain areas (e.g., science, art, foreign language, etc), these SHSs have become increasingly popular, especially since the early 2000s, for their outstanding admission rate to top-ranked universities (Jung & Mah, 2014). The boom of SHSs, as H.-Y. Park (2007, pp. 449-450) argued, not only accelerated the articulation of education as a ‘game of “choice”’: choices for effective programs, efficient teachers, and competent institutes for exams’, but also the overheated competition to get into the SHSs, which itself drove up the financial burden for many families to pay for extra private tuitions. As such, whether or not SHSs should be abolished became a topic of political debate during the 2012 Presidential election, where all other candidates except Park (right-wing) supported the abolition of SHSs. The system of SHSs, following the election of Park as the president, was retained based on the claim that the original purpose of the SHSs was to respect each student’s aptitude and talent, which is in accordance with the HEP vision (MOE, 2014b, p. 62).

The Free Semester Initiative (hereinafter, FSI), in particular, was introduced as the right-wing NFP government’s flagship education project. The FSI is designed as a one-semester programme to encourage students at the lower secondary level to engage in a wide variety of extracurricular activities (e.g., cultural and club activities, arts/sports, and career explorations) that are closely aligned with their dreams and talents. These activities are encouraged to be provided through cooperation between local communities and schools. The instruction hours spent on the core academic subjects (i.e., Korean, English, and Mathematics) are instead reduced, and during the semester, students are exempted from mid-term and final examinations with no formal grading. The FSI not only sought to expand and enhance student-oriented and demand-based educational programmes, but also to institute change and improvement in the school curriculum, particularly by diversifying methods of student evaluation, and encouraging student participatory and project-based learning instead of the traditional teacher-centred learning (MOE, 2013d).

What is also notable across the MOE and government think-tank reports on the FSI is the emphasis on ‘futuristic competencies’ (MOE, 2013d, 2015b; S. Choi, 2013). It is argued that, until now, the country’s education system ‘has not been able to develop the competencies that talents of the future society must have’ (S. Choi, 2013, p. 5). With a direct reference to the OECD DeSeCo’s Key Competencies (e.g., creativity, collaboration and empathy), the

government emphasises the importance of ‘innovating’ the country’s education system (MOE, 2015b), and of nurturing both the cognitive and non-cognitive competencies of students (S. Choi, 2013, p. 7). These competencies, as argued in these reports, are expected to be gained not only through changes in instructional practices (i.e., participatory and project-based learning), but also through ‘vocational education’. In fact, vocational education constitutes an important component of the FSI, wherein career exploration opportunities at lower secondary level would help the students to bridge their ‘career perception’ stage at primary level and ‘career design’ stage at upper secondary level. Schools are also encouraged to introduce an optional subject ‘Career and Occupation’ and reflect the ‘Achievement Standard and Index for School Vocational Education’ in the curriculum subjects (e.g., Korean, English, Mathematics, Social Studies, and Science), as well as the comprehensive vocational education programme called the ‘School Career Education Programme’ (MOE, 2013d).

The FSI, however, received many criticisms, particularly with regard to the possibility that having no exams during the free semester would result in a fall in the scholastic performance of students (Jung et al., 2020), and that the FSI may even increase the socioeconomic gap in household expenditures on shadow education (Y. Park, 2017). Despite such concerns, under the Enforcement Decree of the Elementary and Secondary Education Act (Sep. 15, 2015), the FSI was fully implemented from 2016 onward.

As demonstrated, under the umbrella term of ‘Happiness Education’, there existed a myriad of meanings of ‘happiness’ including, but not limited to, ‘freedom’, ‘self-efficacy’, ‘creativity’, ‘choice’, ‘character’, and many more. The following section explores how these meanings continued to form an important part of the education reform agenda under the subsequent left-wing Democratic Party in Korea (DPK) government, albeit with lesser use of the term ‘Happiness Education’ and greater emphasis on the notions of ‘innovation’ and ‘innovative talents’.

6.5 Happiness and ‘Innovative Talents’: The left-wing DPK government

Following a political scandal – the so-called Choi Soon-sil gate – involving President Park,⁴ the NFP government’s approval rating fell to 4% (*The Guardian*, 2016), along with a series of protests against Park from November 2016 to March 2017. The parliament vote took place in December 2016, where 234 out of a total of 300 members of the National Assembly voted in favour of Park’s impeachment. In March 2017, the Constitutional Court of Korea upheld the parliament’s decision on the impeachment, effectively removing Park from office. The DPK candidate, Moon Jae-in, subsequently won the Presidential by-election that took place in May 2017 and was inaugurated into office immediately after the election.

Before focusing on education policies implemented by the left-wing DPK government led by Moon (2017-2022), it is worth highlighting the already-existing similarities in policy discourses between the left- and right-wing camps during the 2012 presidential election. One of these similarities was the two candidates’ emphasis on ‘relaxation’. Similar to the Japanese *yutori* reform (see **Chapter 3**), both candidates emphasised the need to reduce the student burden of examinations and school work. Their proposals, however, focused on the lower secondary level, unlike how *yutori* reduced schooling days, hours, and the curriculum content at the primary education level. While Park’s NFP camp proposed – and later introduced – the FSI, Moon’s then Democratic United Party (DUP) camp also proposed to introduce what it called the ‘Happy Grade 8 Project’. Both initiatives directly benchmarked and referenced Ireland’s ‘Transition Year’ programme and, hence, similar to the FSI, Moon’s Happy Grade 8 Project also proposed to relieve Grade 8 students from the burden of academic stress and examinations so that they can spend either a semester or a full year on searching for their career interest (K. J. Park, 2012). Additionally, not only the promotion of educational welfare (e.g., to provide free upper-secondary school education) was prominent in the election promises of both Park and Moon in 2012, but both camps also showed a consensus on ‘reforming’ the country’s education system to help students build ‘key competencies’, ‘character’, and ‘creativity’, which the DUP party described would ‘contribute to a harmonic development of individuals and the community’ (DUP, 2012, p. 212).

⁴ In 2016, Choi Soon-sil, a family friend of 40 years of President Park Geun-hye, was accused of being the mastermind of major state affairs of the Park administration and using her personal ties with Park for her own financial gains. In February 2018, Choi was found guilty of bribery, interfering in state affairs, and abuse of power, and was sentenced to 20 years in jail.

Such bipartisan agreements in policy promises contributed to the continuation of many of the Park's education initiatives, most notably the FSI. Despite the many concerns over the FSI, it was not viable for the Moon government to discard the existing FSI as it would have meant some lack of coherence in the party's message. So instead, the government continued to emphasise the importance of 'changes' brought by the FSI – despite the fact that these changes were largely measured and evidenced by the rather simplistic results of a satisfaction survey of teachers, parents and students – and soon expanded the initiative to a year-long programme and was renamed as the Free Year Initiative (MOE, 2017b).

The umbrella notion of 'happiness' remained as the DPK government's policy signifier as well, despite the government's earlier call to promote 'the era of people's sovereignty' – as opposed to the previous right-wing NFP government's vision of 'the era of people's happiness' – as a new national vision (National Planning Committee 2017, p. 7). The 'right to pursue happiness', for example, was often found in the presidential speeches and reports under the Moon government (J. Lee, 2020; YTN, 2020), most of which were a reference to Article 10 of the Constitution of the Republic of Korea, stipulating:

All citizens shall be assured of human worth and dignity and have the right to the pursuit of happiness. It shall be the duty of the State to confirm and guarantee the fundamental and inviolable human rights of individuals. (Constitution of the Republic of Korea. Art. x)

As Article 10 stipulates, individuals' right to pursue happiness is mandated as the duty and responsibility of the state. By reiterating this constitutional article as the 'goal' of the state, the government seeks to promote the *pastoral* role of the state, 'reassure' the public, and reframe the relationship between the state and the individual:

[1] Today, on the occasion of the 75th anniversary of Liberation Day, I look back to see whether each individual has achieved liberation. And I think of a country that exists to guarantee individuals' decent lives – not one where individuals exist for it. This is also about an era marked by Article 10 of the Constitution: All citizens shall be assured of human value and dignity and have the right to pursue happiness. This is the goal that my Administration is aiming to achieve. (Office of the President, 2020)

[2] The state must take responsibility for efforts to realize substantial equality. It is necessary to play an active role as a state so that all citizens can protect their dignity and values and be happy. (TheBluHouseKR, 2018)

What also sustained the term 'happiness' as the country's policy signifier was the similarities in how the two governments dealt with the 'uncertainties' of the future. The belief in 'technological developmentalism' (i.e., the understanding of technology as the primary driver

of national economic growth) has long been entrenched in the country's science and technology policies, not just since the 'developmental state' era in the 1960s, but going back as far as the Joseon Dynasty (1392-1897) (Jasanoff & Kim, 2009; E.-S. Kim, 2018). However, with the continuing decline of manufacturing industry and the growing expectation of the 'revolutionary' potential of technology in all aspects of human life (Vicente & Dias-Trindade, 2021), both Park's right-wing NFP and Moon's left-wing DPK governments put forward the Fourth Industrial Revolution (4IR) as one of their core socioeconomic agendas.

The sociotechnical imaginaries (STIs; see **Chapter 2**) of the 4IR showed little difference between the two governments, wherein both fundamentally argued that any rapid changes brought by the technological revolution of the 4IR involve unprecedented disruptive power and that the country needs to be well prepared against them (korea.kr, 2016; Presidential Committee on The Fourth Industrial Revolution, 2022). Their visions of the 4IR, however, were articulated through different political and economic slogans. While the right-wing NFP government promoted the slogan of 'creative economy' as covered in the previous section, Moon's left-wing DPK government attempted to make a distinction by introducing three new economic slogans: 'people-centred social economy', 'innovation economy', and 'inclusive growth' (DUP, 2012; National Planning Committee, 2017). Interestingly, a particular 'storyline' can be found in the DPK government's narration of these slogans:

[1] Over the past nine years, Korea has been **driven to the brink of collapse**. The **nation's foundations**, including the national government system, the economy of people's livelihoods, democracy and national human rights, a safe society, inter-Korean relations, and diplomatic and security, have **all collapsed**. The momentum for economic growth has been **lost**, and unemployed young people are **giving up** on marriage and childbirth. This is the result of an **incompetent government deceiving the people**. (DPK, 2017, p. 4, my emphasis)

[2] ...the coming of the era of the people, in which the **people are no longer an object of governance, but are the masters of the country and the substantive actors of politics**. (National Planning Committee, 2017, p. 7, my emphasis)

[3] Koreans are **entitled to happiness befitting** an era of annual per capita income of US\$30,000. This is what an '**inclusive country**' is all about. (*Korea Herald*, 2019, n.p, my emphasis)

[4] **Making the uncertain future certain** depends on **how well we raise the people** who will make the future clear. We will create an environment where all our citizens can become **creative** people who come up with new things, people who **boldly challenge and think of failure as assets**, people who have the **knowledge and skills that the new era demands**, and people who **respect the values of cooperation and sharing**. (MOE, 2017c, n.p, my emphasis)

[5] The **Fourth Industrial Revolution** calls on education systems around the globe to **keep pace with the changing societal landscape and to drive further innovation**. The Korean government's plan for innovation in the public education sector includes: 1) supporting the development of student competency through customized career education; 2) innovating the education system with digital technologies; and 3) building teacher competency as agents of innovation. (MOE, 2020, p. 35, my emphasis)

The quotes above resonate with what Schiølin (2020) identifies as the core discursive strategies in the *making* of the 4IR: the dialectics of (i) pessimism and optimism, (ii) inevitability, and (iii) epochalism (p. 549). First, by framing the *present past* governed by the 'incompetent [right-wing NFP] government' as being 'at the brink of collapse' (DPK, 2017, p. 4) and the *future* under the new left-wing DPK government as the coming of the new era in which people are no longer *passive* political objects, the left-wing DPK government offers a sense of optimistic empowerment to the public. Second, as also was the case with the OECD (see **Chapter 5**), while the future is described as 'uncertain', there is seemingly a clear idea of what knowledge and skills are needed and demanded by the new era. What characterises such a narrative is the 'inevitability' of changes (i.e., the 4IR), and this idea of inevitability serves as a discursive catalyst to, first, problematise the present past, and second, construct the need for (specific) reforms which, in normal times, may not be considered nor accepted. In other words, the promises of 'happiness' and 'becoming the leading 4IR nation' (National Planning Committee, 2017, p. 12) can be seen as a *breakaway* from the *miserable* and *unhappy* past that gives more optimism towards the future of the country (Auld & Morris, 2021; Schiølin, 2020).

Similarly, the term 'happiness' continued to remain a signifier in many of the Moon government's educational initiatives. These initiatives include the government-funded *Happy Dormitory* initiative which seeks to reduce the housing cost burden of college students (MOE, 2020), and the Moon government's flagship education policy – the *High School Credit System* – which allows upper-secondary school students to select their subjects based on their desired careers. The High School Credit System (HSCS), for instance, was advertised through the slogan 'Student-centred Happiness Education in which one can choose his or her favourite subject' (MOE & KICE, 2018, p. 1). Similarities can also be found in the ways the introduction of the HSCS was legitimated:

[1] The Ministry of Education is promoting the introduction of a high school credit system to enable students to learn the core competencies necessary for the future society through self-

directed learning and to achieve changes in the overall education system. (korea.kr, 2019, para. 2)

[2] ... help each student find his or her career path and become a self-directed talent amid uncertain circumstances, such as the rapid social changes brought by the Fourth Industrial Revolution, infectious diseases, and a sharp drop in the school-age population. (MOE, 2021, p. 2)

The importance of nurturing a ‘self-directed’ learner is stressed not only across the two quotes above but throughout many reports and leaflets published by the MOE. The meanings associated with a self-directed learner include, for example, ‘making their own decisions’, ‘taking responsibility’, and ‘designing their own career path’ (MOE & KICE, 2018, p.2; 2022).

Another notable ‘happiness’ initiative supported by the Moon government was the expansion of the ‘Innovation Education District’ initiative. The origin of the initiative can be traced back to 2011 when six local districts in Gyeonggi Province (Gwangmyeong, Guri, Siheung, Anyang, Osan, and Uijeongbu) launched the Innovation Education District initiative under the leadership of Kim Sang-gon, left-wing Superintendent of Education. The Innovation Education District initiative initially emerged to provide both financial and administrative support to individual ‘innovation schools’, either located in rural or low socioeconomic status regions, so that students from disadvantaged backgrounds can enjoy a supportive learning environment (M. Lee et al., 2022). However, as the initiative gradually expanded across other regions, particularly since 2014 when left-wing Superintendent candidates were elected in 13 out of 17 metropolitan cities and provinces, the main focus of the Innovation Education District initiative also changed to shift the locus of education from individual schools to local communities. It promotes the formation of a local educational environment, wherein parents, schools, local communities, and local offices of education would cooperate, and encourages all members of the communities to become agents of education change (N. Y. Kim, 2020).

In tandem with the expansion of the Innovation Education District initiative was the ‘resignification’ of the term ‘innovation’. The decision of which name to use and label ‘Innovation Education District’ is autonomously made by each regional office of education. Despite having little difference in purpose, more than six out of a total of 16 offices of education (re)named their initiatives the *Happiness Education District* (e.g., Gangwon Happiness Education District). Also, interestingly, two of the most recently established

Innovation Education Districts were named the *Future Education District* (e.g., Daegu Future Education District) (ibid.).

If the objective of the Innovation Education District – and its other forms – was to promote a ‘Public-Private-Academic’ partnership to create a local educational community, the objectives of ‘Innovation Schools’ included promoting (i) greater school autonomy, (ii) innovation in curriculum and assessment, (iii) democratic citizen education, and (iv) communitarian approach to education (M. Lee et al., 2022; Gyeonggido Office of Education, 2020; Y. Kim, 2021). Y. Kim’s (2021) analysis of the changes in the Seoul Metropolitan Office of Education’s conceptualisation of ‘Innovation School’ over the past years also demonstrates how the terms ‘happiness’, ‘innovation’ and ‘future’ have increasingly been ‘muddled’ with one another:

Definition used from 2015 to 2016

[Innovation School in Seoul is] an educational community in which students, teachers, parents, and the local community **communicate, participate and cooperate**, realising ‘**responsible education**’ of learning and **caring** and pursuing **whole-person education**. (ibid., p. 61, my emphasis)

Definition used from 2017 to 2020

[Innovation School in Seoul is] a **happy educational community** of learning and caring which nurtures **democratic and creative talents for the future** with the aims of **educational equality** and **whole-person education**. (ibid., my emphasis)

Unlike the first conceptualisation which emphasises the values of communication, participation, and cooperation, the new conceptualisation of ‘Innovation School’ since 2017 not only reflects the aim to foster ‘future talents’ but also articulates this aim in a humanistic manner using notions such as ‘democratic talents’, ‘happy educational community’, ‘educational equality’, and ‘whole-person education’.

This section revealed how the floating nature of the term ‘happiness’ as a policy signifier has been amplified under the left-wing DPK government, leaving ample room for resignification. The following section draws together the findings from the earlier sections and explores in depth the role the term ‘happiness’ plays as a floating signifier and its potential implications in regard to the formations of (i) implicit political bipartisanship and (ii) ‘undisputed’ sociotechnical imaginaries of the future.

6.6 Discussion and Conclusion: From ‘Learning for Happiness’ to ‘Happy Human Capital’

Notable in the two sections above was the constant use of the term ‘happiness’ as a floating signifier across both right-wing NFP and left-wing DPK governments. While its earlier meanings stemmed from humanistic visions of education, such as ‘freeing’ students from academic pressure, tackling school violence through character education and anti-bullying programmes, as well as promoting physical education, the policy objectives of HEP also revealed a strong ‘eventual’ association with – or reversion to – the economic narratives of education (i.e., nurturing ‘future talents’ who are creative, democratic, and innovative) that rest on the two governments’ sociotechnical imaginaries of the future.

It is then imperative to understand and unpack the nature of domestic politics and policymaking to understand why the right-wing NFP’s HEP persisted through the left-wing DPK government. Several factors contributed to such an unspoken, and mostly undisputed, political agreement on the continuous use of the term ‘happiness’ as a floating signifier. The first is a lack of clear conceptual definition of ‘happiness’, the point that emerged across all interviews:

[1] I have been invited to give talks to Korean government officials, including the Bank of Korea, the Statistical Office and also the Seoul Metropolitan Government. They **always mention ‘happiness’ and ask how they should improve their citizens’ well-being and happiness**. But when you talk about the specifics of happiness, you will soon find that they have **a very different understanding**. They are still talking about **material well-being** – employment, social connections, all those traditional or more broad social indicators, plus economic indicators. As for ‘subjective well-being’, I think they still have doubts about it. (Interviewee #1, 25/02/2021, my emphasis)

[2] Elite bureaucrats believe that **the more ambiguous the policy terminology is, the easier they can exercise their power**. It is important to think from the **provider’s point of view** – for them, the most optimal status in the system might be the one that is the most ambiguous and opaque. (Interviewee #2, 19/02/2021, my emphasis)

[3] Politicians would talk about the happiness of the people, but **they neither measure the level of happiness** nor come up with **specific programs** that would increase the feeling of happiness. Happiness is just **added as a modifier** to all the policies the government has been carrying out, even to those that are not directly related to happiness. (Interviewee #3, 21/02/2021, my emphasis)

[4] Policymakers need to really think carefully about what happiness is. It should be about learning and the intrinsic growth of individuals. But, instead, it has been used as **electoral rhetoric wrapped in meaningless and beautiful stories**. I think [not just Happiness

Education, but all] policies need to be designed very carefully, but they are still very **poorly designed**. (Interviewee #4, 07/03/2021, my emphasis)

Although the interviewees had different experiences and degrees of involvement in the making and delivery of HEP as policy intermediaries, what was consistent is that they viewed the term ‘happiness’ as a deliberate rhetorical choice. Both governments’ association of the term ‘happiness’ with distinct, or even disparate, policy initiatives (e.g., labour market reform, vocational education, FSI, higher education structure reform) (MOE et al., 2016) opened up the room for constant resignifications of ‘happiness’.

Any contradictions that may arise from how the notion of ‘happiness’ is used in such policy discourses also tend to go without challenge. One interviewee explained that this is because of the absence of ‘the system of checks and balances’ in the country’s education policymaking system – the second factor that sustains, or even enhances, the floating meanings of ‘happiness’ and ‘Happiness Education’:

We have come to a bipartisan agreement on the ‘Happiness Education’ agenda, and have had the same agents – except the principal agents – over a long time. The problem is, if you work with the same people over and over again, it becomes more and more difficult to oppose each other. (Interviewee #2, 19/02/2021)

Such a bipartisan consensus between the left- and right-wing parties first and foremost comes from the urgency of addressing and ‘soothing’ the public’s dissatisfaction towards the government, particularly by employing humanistic signifiers and narratives such as happiness. Second, as Interviewee #2 also put it, the agents behind the education policymaking hardly change, many of whom, according to Jang (2022, p. 62), were ‘more strongly inclined to adopt competencies based on the strategy of catching up to the West than were professionals with years of research experience in the field’. Jang also argues that, despite the emergence of new advocacy groups such as the teachers’ union, during the 2015 National Curriculum Reform, the MOE continued to remain as the main homogeneous policy actor, explicitly echoing the right-wing NFP government’s emphasis on ‘creative economy’, ‘science and technology education’, ‘competences’, and ‘entrepreneurial vision of education’.

The final driver behind the use of ‘happiness’ as a floating signifier is the continuing attempts to ‘horizon scan’ and identify best practices elsewhere (see Bamberger & Kim, 2022). As described in **Chapter 1**, since the mid-2010s, the fascination in Korea for Nordic education has rendered numerous invited talks, visits, and conferences in Korea at the ministerial level.

Also, many of the HEP and innovation education initiatives introduced by the left- and right-wing governments explicitly referenced a wide range of Nordic and other European initiatives such as but not limited to, Finland's cooperative and collaborative learning, Sweden's work experience programme (*Praktisk arbetslivsorientering*), Denmark's Afterschool programme (*Efterskole*), 'Creativity, Activity, Service' (CAS) component of the International Baccalaureate programme, as well as Ireland's Transition Year as the role model(s) of the HEP (MOE, 2013d, p. 5). Not only does the focus of these overseas models vastly differ from one another, but also as an anecdote shared by Interviewee #3 also demonstrates, these models may have been referenced and appropriated superficially – merely as a source of legitimation:

In 2017, during the visit of Finland's National Project Manager of the OECD PISA to Korea, we had the opportunity to engage in a conversation with him at the Seoul Metropolitan Office of Education. It was during this conversation that we discovered the true motive behind Finland's curriculum reform since 2014. Contrary to our previous belief that the reform aimed to prepare for the Fourth Industrial Revolution era, we learned that it was actually driven by the revelation from the PISA 2012 survey, which indicated that Finnish children were not happy. (Interviewee #3, 21/02/2021)

Such bipartisan consensus on promoting HEP as a channel to nurture 'future talents' is concerning in many ways. Similar to the OECD (see **Chapter 5**), the promissory connotation embedded in the notion of 'happiness' constructs an imaginary vision of the 'alternative bright future', wherein (i) citizens are prepared to 'actively respond to sudden socio-economic changes caused by the Fourth Industrial Revolution' (MOE, 2017a, p. 6), and (ii) the country, with its abundant future talents, would lead the 4IR (korea.kr, 2016; National Planning Committee, 2017). By contrasting this promissory future to 'potential predicaments' the country might face without a transformative change, such as a skills mismatch and higher unemployment rates, the governments expand and consolidate the legitimacy of their HEP. Other alternative visions of the future are subsequently policed and erased by the dominant imaginary embedded in the HEP (for 'bounded imaginaries' see Smith & Tidwell, 2016), and, in so doing, the proposal to cultivate '*happy human capital*' remains as the 'best', if not only, solution for the country to go forward and realise its sociotechnical imaginaries, namely technological developmentalism.

Over the past decades, an extensive literature has explored how global humanitarian goals, such as the lifelong learning, creativity, global and democratic citizenship, have been redefined and incorporated into national education policy and curriculum reforms (Engel, 2014; Sousa & Oxley, 2021), and also how they eventually 'reverted back' to the neoliberal

and human capital narratives (Auld & Morris 2019; Elfert 2017; Goren & Yemini 2018; Grey & Morris 2022). This chapter began with a brief overview of party politics in Korea, which was then followed by a thorough overview of the different socio-political backgrounds prior to the 2012 Presidential election. The analysis then focused on the policy framework and discourses employed by the right-wing NFP government led by then President Park Geun-hye (2012-2017) and the left-wing DPK government led by then President Moon Jae-in (2017-2022). A close look at these data revealed that, unlike its earlier emergence as an humanistic antidote to the public's dissatisfaction towards the government, both 'happiness' and 'Happiness Education' became floating signifiers, wherein they were constantly resignified with new – largely disparate – meanings such as 'creative (convergence) talents', 'character education', and 'digital and software skills', most of which consist of the competencies which the governments deemed as essential for realising their sociotechnical imaginaries of the 4IR.

As one of the few countries, including Japan, that specifies 'the right to pursue happiness' as a fundamental Constitutional right, the governments' call for happiness embodies a strong humanitarian commitment; that is, by providing a series of 'happiness' initiatives, such as the HEP, they give the public a sense of a 'safety net', where individuals can 'freely' explore, navigate, and pursue their dreams and talents. But simultaneously, what is proved to be a recurring and dominant policy discourse is a neoliberal vision of an 'ideal citizen': the *happy* human capital (see also M. J. Kim, 2022). Similar to the OECD (**Chapter 5**), a wide range of promissory and anticipatory narratives were employed, along with a series of 'warnings' on the potential crises, through which the two governments effectively validated their proposals to reorient the education system in accordance with the 21st future competencies. Happiness Education, in such sense, is narrowed down to equipping individuals with a set of soft skills, such as the agency to search for and develop their own career path, creative problem solving and innovative thinking skills that are crucial in the 4IR era, as well as a 'positive' mindset that would value the communitarian responsibility above oneself.

The following chapter reveals that the two governments' visions of 'happy human capital' and the role of education are a far cry from how they are transmitted and understood by school-level actors.

Chapter 7 School-level actors' understanding of happiness and their role in promoting student happiness

'Between the idea and the reality, between the motion and the act, falls the shadow.'

A quote from a poem *The Hollow Men* by T. S. Eliot (1925)

7.1 Introduction

The previous two chapters (**Chapters 5 and 6**) examined how the OECD and the two Korean governments used the notion of 'happiness' as a floating signifier to (re)shape and legitimise their broader institutional, economic, and political objectives. This chapter takes a different approach with the following research question: '*How do school-level actors (teachers, school leaders, and education professionals) understand student happiness and well-being and their role in promoting them, and why?*'

Central to this investigation was the belief that no matter how a policy issue gets defined and framed at the global and national levels – that is, even if that very policy revolves around the humanistic idea of 'student happiness' – unless school-level actors can fully *empathise* with its purpose or are capable of reflecting upon their current approaches and pedagogic practices, substantial changes will not be made. This belief is informed by prior literature that problematised the gap between intent and implementation (P. Morris, 1985; Van Meter & Van Horn, 1975), particularly by Basil Bernstein's (1990) work on the notion of 'recontextualisation' which argued that when policy knowledge 'created and dominated by the state and its selected agents and ministries' (Singh et al., 2013, p. 486) enters the pedagogic setting (or *pedagogic recontextualising field* as Bernstein puts it), it will be interpreted, translated, and then implemented in accordance with beliefs and values held by those who are practising and teaching it. In other words, this thesis recognises school-level actors as active 'recontextualising' agents of knowledge, rather than passive receivers or transmitters of policies. It posits that pedagogic actors hold the relative autonomy and agency to translate, selectively appropriate, and even interrupt official discourses and, as recontextualising agents, these school-level actors are capable of selecting specific instructional strategies at an appropriate time and context, and reflecting them in practice (Bernstein, 1990).

Examining this gap between policy discourses and school-level actors’ perceptions and actual practices in schools is crucial because the latter would have an impact not only on how and what they would teach in the everyday school setting but also on how these actors exercise their professionalism (Eisenmann, 1991). Also, by demonstrating school-level actors’ active ‘translations’ and ‘reshaping’ of transmitted policy knowledge, this thesis reveals varying levels of localisation and recontextualisation at both policy and practice levels, adding a further layer of critique of world culture theory and its account of ‘isomorphism’.

The first set of data was collected from online questionnaires distributed to 50 respondents, comprising school commissioners and inspectors, school leaders, and teachers at all levels of education, between October 2021 and January 2022. The key demographics of the questionnaire respondents can be found below (Table 7.1).

Table 7.1. Demographic characteristics of questionnaire respondents

Variable	Frequency	Percent (%)
Gender		
Male	13	26.0%
Female	37	74.0%
Total	50	100.0%
Age		
20 – 29 Years	1	2.0%
30 – 39 Years	10	20.0%
40 – 49 Years	30	60.0%
50 – 59 Years	8	16.0%
60+ Years	1	2.0%
Total	50	100.0%
Occupation (present or most recent)		
Teacher	42	84.0%
School administrator (Principal, Vice Principal)	4	8.0%

Education professionals (School commissioner, inspector, academics)	4	8.0%
Total	50	100.0%
Number of Years of Teaching Experience		
Less than 1 year	1	2.0%
1 – 4 years	2	4.0%
5 – 9 years	9	18.0%
10 – 19 years	19	38.0%
20+ years	19	38.0%
Total	50	100%
Level of School		
Preschool	5	10.2%
Primary school	14	28.6%
Lower secondary school	11	22.4%
Upper secondary school	19	38.8%
Total	49*	100%
Type of School		
National school	4	8.2%
Public school	39	79.6%
Private school	6	12.2%
Total	49**	100%

* One of the respondents chose not to disclose the *level* of school they are (or were) working in.

** One of the respondents chose not to disclose the *type* of school they are (or were) working in.

As the demographics table indicates, the questionnaire sample was skewed towards female respondents (74.0%) than male respondents (26.0%). Major distributions of respondents were mostly teacher respondents comprising 84.0% of the entire sample, and the remaining were divided up between school administrators such as principals and vice principals (8.0%) and education professionals, including school commissioners, school inspectors, and academics (8.0%).

Another interesting demographic consideration is whether the questionnaire respondents have had any prior experience in continuing professional development on the topic of ‘Happiness Education’. Table 7.2 illustrates that only eight respondents (16.0%) amongst 50 had prior continuing professional development experience in ‘Happiness Education’.

Table 7.2. Prior training on Happiness Education

Prior training on Happiness Education	Frequency	Percent (%)
Yes	8	16.0%
No	42	84.0%
Total	50	100%

Only five – one education professional and four teachers – among these six respondents shared specific details of the training they received. The topics on Happiness Education varied considerably. For example, the education professional received training on the ‘Happiness Education District Project [*haengbok gyoyuk jigu saop*]’ (for ‘Happiness/Innovation Education District’ project, see **Chapter 6**), which emphasises the importance of establishing a local education community. The continuing professional development programmes that teacher respondents had received also varied considerably. The topics ranged from ‘Happy children and different types of play based on Maslow’s hierarchy of needs’, ‘Teachers’ happiness – satisfaction at work and stress management’, ‘Korea’s Happiness Education project’, ‘Foundational workshop on Happiness Education’, ‘How to create a happy school’, to ‘Creating a happy school culture through restorative life education’. This reveals that while these four respondents had similar opportunities for professional development over the past decade, and although all these programmes may be subsumed under the broad category of ‘Happiness Education’, the specific aspect of ‘Happiness Education’ each addresses diverged, ranging from supporting local education community projects, promoting teacher well-being and happiness, fostering play-based learning, to promoting a positive school culture.

These questionnaire responses were then interrogated and analysed in tandem with the second set of data, which involved semi-structured interviews collected from 10 of the questionnaire respondents from November to December 2021. The brief demographics of the interviewees can be found below, consisting of nine teachers ranging from preschool to upper secondary

school and one vice principal who worked as a former school commissioner for 9 years (Table 7.3).

Table 7.3. Demographic characteristics of interview participants

Pseudonymised name	Occupation	Level of School	Type of School	Years of experience	Method of interviewing
Moana	Teacher	Preschool	Public	1-5 years	Face-to-face
Hye-kyo	Teacher	Primary	National	10-20 years	Online
Ryan	Teacher	Primary	Public	20+ years	Online
Satto	Teacher	Primary	Public	20+ years	Online
Sunny	Vice principal / Former school commissioner	Primary	Public	20+ years	Online
Michael	Teacher	Lower secondary	Private	10-20 years	Online
Tonky	Teacher	Lower secondary	Private	5-10 years	Face-to-face
Hyunjun	Teacher	Lower secondary	Public	5-10 years	Face-to-face
Pandora	Teacher	Upper secondary	Private	20+ years	Online
Emily	Teacher	Upper secondary	Public	10-20 years	Online

As also mentioned in Chapter 3, all interviewees were pseudonymised with their chosen names from their favourite animations, TV shows or movies (which was part of the icebreaking activities at the beginning of every interview), unless they have given their direct consent to reveal their identities.

This chapter is divided into three parts. The first focuses on the ‘beliefs’ held by participants in relation to (i) the aims of education; (ii) what happiness and well-being mean; (iii) their role in promoting student happiness and well-being; and (iv) what they ‘count’ as Happiness Education practices. The second part focuses on the factors that ‘disrupt’ these school-level actors from realising their vision and fulfilling their perceived role. The final part is what I describe as the ‘tip of the iceberg’ – it seeks to unpack and explore the ‘hidden’ imaginations and aspirations of the interviewees, wherein the interviewees were asked if they have specific know-how and experiences which they define as ‘Happiness Education’ and, if conditions are permitted, what would they aspire to do in the near future.

By doing so, this chapter reveals that the belief and narratives delivered from the national level through the medium of policy documents, press releases, and government speeches are not necessarily sympathised with or taken up by school-level actors. Some interviewees

acknowledged that they do not even follow what they inscribed in their lesson plans or what they are instructed to do. The majority responded that education for collective happiness is mostly practised ‘outside’ the classroom, for example, by supporting students’ self-governing activity programmes and by providing more opportunities for students to have their voices heard. This tendency was particularly profound amongst lower-secondary and secondary teacher participants but also appeared at the primary school level.

7.2 ‘Belief’

Much has been written about how teachers’ beliefs shape their decisions regarding the ways they teach and support their students (Biesta et al., 2015; Pajares, 1992). Drawing on the data collected and analysed through questionnaires and interviews, this section focuses on the beliefs and perceptions school-level actors hold regarding student happiness and, more generally, well-being.

7.2.1 A quantitative overview of perceived aim(s) of education

As explained in **Chapter 4**, the original survey conducted by Ashton et al. (1975) linked educational aims to different aspects of development, such as intellectual, physical, aesthetic, spiritual/religious, emotional and personal, social, and moral development. The survey I adapted also covered the same aspects of development, except for spiritual and religious aims of education due to their limited relevance to the context of national and public schools in Korea – the vast majority of the respondents of my survey (87.8%) were from secular national and public schools, and none from independent, alternative or religious schools. Also, unlike the UK school context, private schools in Korea also need to comply with the national curriculum and government education policy implementation.

Appendix 7 displays the table of frequency and percentage of the responses given to each of the aim statements on a Likert scale, as well as their median and mode. Overall, it shows that the medians of all 40 statements fall on a scale between 4 (‘Of high importance’) and 5 (‘Of extremely high importance’). Most of the statements (36 out of 40) were acknowledged as an aim of education, regardless of their perceived importance. Only four out of 40 items (Statements 9, 22, 24, and 37) received one score of 0 each. In fact, it was unsurprising to see

such a low frequency of a score of 0, as it implies that the participant explicitly rejects the statement as an aim of education. However, I wanted to test whether these four statements each with one score of 0 had lower aggregate scores than the rest of the statements. To test this, the index of the accumulated score (i) was calculated using the following equation (1):

$$(1) \quad \text{The index of accumulated score } (i) = \left(\frac{\Sigma (s \times n_s)}{\text{Mean of } \Sigma (s \times n_s)} \right) - 1$$

where, 's' represents the score and 'n_s' is the frequency of the score s.

Figure 7.1 plots the accumulated score index of all statements. Block dots represent the statements that all respondents agreed as potential educational aims (with no score of 0) despite the varying degrees of perceived importance, whereas the red dots represent the statements that had at least one score of 0. It shows that the accumulated score indexes of statements 9, 22, 24, and 37 (red dots) were considerably lower than most of the statements where their indices ranged between -0.05 and -0.10, meaning that there is a consensus that the respondents generally saw these statements as less important.

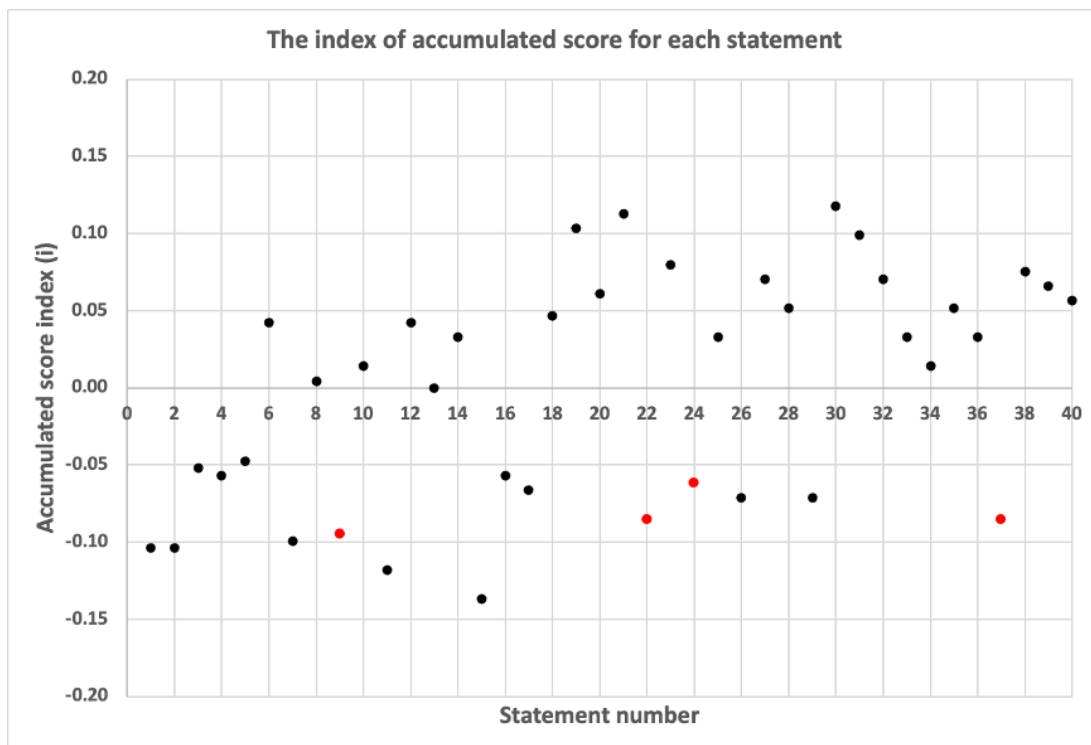


Figure 7.1. The index of accumulated score

The raw data were then grouped into five aspects of development for further investigation of their broader patterns. These aspects include: (i) Intellectual Development (ID); (ii) Physical Development (PD); (iii) Aesthetic Development (AD); Emotional and Personal Development (EPD); and (v) Moral and Social Development (MSD). The response variation across the five aspects of development can be found below in the box-and-whisker plot (Figure 7.2). The median data reveal that the respondents' perceived importance of educational aims was in the following order: EPD > MSD > PD > ID > AD. The differences between the medians of EPD (4.48), MSD (4.46), and PD (4.38) were small, whereas both ID (4.00) and AD (3.96) were comparably lower than others.

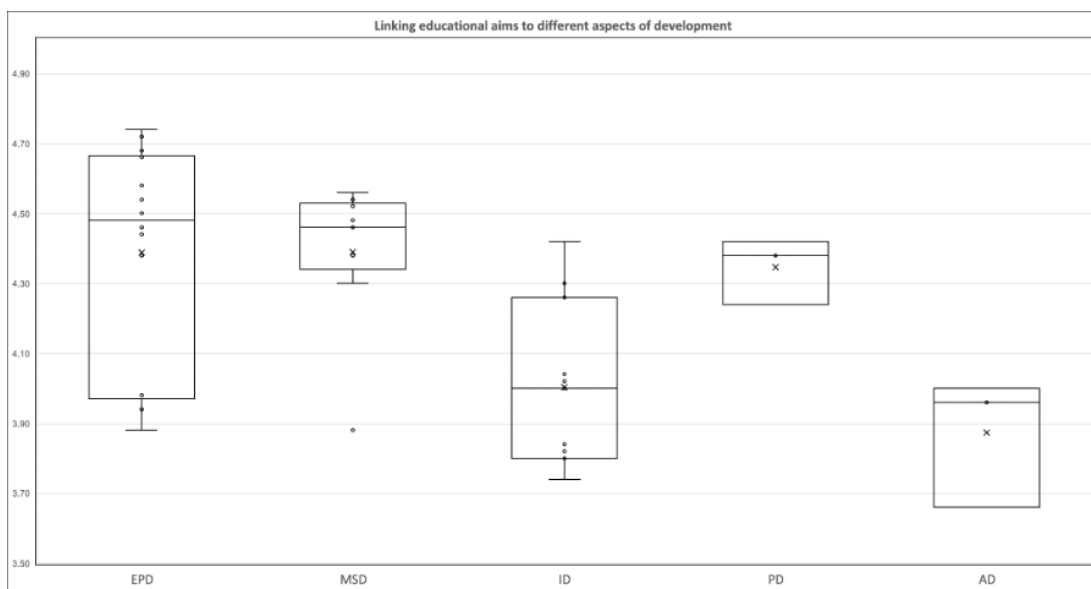


Figure 7.2. Linking educational aims to different aspects of development

Apart from ID where the distribution was slightly positively skewed, the distribution of data in the rest of the four aspects of aims was negatively skewed, which means that the data constituted a high frequency of low-rated scores. The lines above and below each box, also known as the 'whiskers', show the range of the highest and lowest scores excluding outliers. Long whiskers indicate that there is a wider range of scores. For both PD and AD, their lower quartiles (4.22 for PD and 3.67 for AD) were equal to their respective minimum scores, and upper quartiles (4.41 for PD and 3.98 for AD) to their respective maximum scores, hence explaining the absence of the whiskers. The figure also indicates that whereas the distributions of the responses for MSD and PD were relatively concentrated as can be seen in their small box sizes (containing all cases between the upper 75% and lower 25% quartiles), the

responses for EPD, ID, and AD were comparably dispersed as their larger box sizes indicate. Hence, it can be argued here that responses to *Moral and Social Development* and *Physical Development* statements were most in consensus regarding their high importance as aims of education.

All 40 aims of education were then listed in descending order of accumulated score index assigned to reveal what specific aspects of aims participants regarded as major (top 20% percentile) and of minor importance (bottom 20% percentile). Table 7.4 below shows the top 20% percentile with a total of 10 statements according to their accumulated score index. Three of these 10 statements (No. 30, 21, 19, 20) focus on student's personal development and growth, largely resonating with 'eudaimonic' dimensions of educational aims (Waterman, 1993). The majority of respondents believed that education should be future-oriented in a way that encourages students to find their purpose and meaning in life (No. 30) and to move towards self-actualisation and self-realisation (No. 21 & 19). There was also a statement that stressed a more 'hedonic' aspect of development, that students should be 'happy, cheerful and well-balanced' (No. 23) ranked in fifth place.

Table 7.4. Top 10 statements according to their aggregate score index (*i*)

Rank	Statement No.	Brief Description	Accumulated score index	Aspect of Development
1	30	Finding own meaning and purpose in life	0.118	EPD
2	21	Encourage them to develop in their own ways.	0.113	EPD
3	19	Self-realisation: recognising strengths and weaknesses and setting goals accordingly	0.104	EPD
4	31	Teach the meaning of happiness and the attitude to live a happy life.	0.099	EPD
5	23	Happy, cheerful and well-balanced	0.080	EPD
6	38	Global citizen	0.075	MSD
7	27	Adaptability and flexibility in outlook	0.071	EPD
8	32	Developing social skills	0.071	MSD
9	39	Well-being of the community and the earth as a whole	0.066	MSD
10	20	Ability to control behaviour and emotion	0.061	EPD

These top 10 statements not only included individual-oriented aims of education (e.g., No. 30, 21, 19), but they also emphasised social and collective aims of education. The three most notable were No. 32 ('Developing social skills'), 38 ('Global citizen'), and 39 ('Well-being of the community and the earth as a whole'), each ranked sixth, eighth, and ninth respectively.

Interestingly, none of these aims was related to advancing students' knowledge in subject matters or developing cognitive skills, such as problem-solving or creativity.

In fact, aims that either focus on the attainment of knowledge and skills or on specific disciplines of learning such as arts, sex education, or physical education were in the bottom part of the ranking list, revealing many similarities with Ashton et al.'s (1975, p.62) findings. Table 7.5 demonstrates the bottom 10 statements according to their aggregate score index which consist of the bottom 20% percentile.

Table 7.5. Bottom 10 statements according to their aggregate score index (*i*)

Rank	Statement No.	Brief Description	Accumulated score index	Aspect of Development
31	26	Creativity	-0.071	EPD
32	29	Labour market and career goals	-0.071	EPD
33	37	Using digital technologies to become a member of the global community	-0.085	MSD
34	22	Form a considered opinion and act upon it	-0.085	EPD
35	9	Utilise digital tools to create and share content	-0.095	ID
36	7	Knowledge of Fourth Industrial Revolution technologies (e.g., AI, Big Data)	-0.099	ID
37	2	General knowledge of the local environment	-0.104	ID
38	1	Wide knowledge of core subjects	-0.104	ID
39	11	Competencies essential in the labour market	-0.118	ID
40	15	Knowledge and skill for some art-making	-0.137	AD

Compared to the statements listed in Table 7.4, the statements in this table focus more on the attainment of knowledge and skills, such as 'knowledge and skill for some art making' (No. 15), 'wide knowledge of core subjects' (No. 1), 'general knowledge of the local environment' (No. 2), 'knowledge of Fourth Industrial Revolution technologies (e.g., AI, Big data)' (No. 7), and 'utilise digital tools to create and share content' (No. 9). Many of these statements also tend to focus on specific purposes, such as using digital technologies to become a global citizen (No. 37) or setting career goals and developing essential competencies to succeed in the labour market (No. 29, 11).

Analysis of the school-level actors' responses to statements related to happiness also provided interesting insights. As shown in Table 7.6, The vast majority of respondents perceived the aims concerning student happiness as either of 'high importance (score 4)' or 'extremely high importance (score 5)'. It is important to note here that each of these statements encompassed

different aspects and meanings of ‘happiness’. For example, the statement with the highest mean score of 4.73 (‘The aim of education is to help students find their own meaning and purpose of life’) described the aim of education as facilitating the discovery of ‘self’ (i.e., learning *for* happiness), whereas other statements described educational aims in terms of teaching students the meaning of happiness (i.e., learning *about* happiness) and teaching students to find enjoyment in their learning and gain satisfaction from their achievements (i.e., learning *through* happiness).

Table 7.6. A high consensus on ‘happiness’ as an aim of education

Sample survey statements concerning different conceptions of students’ happiness	Mean
The aim of education is to help students find their own meaning and purpose in life.	4.73
The aim of education is to equip students with competencies to become individuals who are able to develop in their own ways.	4.71
The aim of education is to help students to realise that they can play an important part in their own development by, for example, recognising their strengths and limitations and setting their goals accordingly.	4.67
The aim of education is to teach students the meaning of happiness and the attitude to live a happy life	4.65
The aim of education is to encourage students to be happy, cheerful and well-balanced.	4.57
The aim of education is to encourage students to make decisions about the future, not only based on their personal needs and well-being, but also on the well-being of the community and of the earth as a whole.	4.51
The aim of education is to develop students sense of community; for example, they should be able to act responsibly as a member of a classroom, school, and of society.	4.45
The aim of education is to teach students to understand their emotions.	4.43
The aim of education is to teach students to find enjoyment in their learning and gain satisfaction from their achievements.	4.36

Despite these varying meanings of ‘happiness’, it is evident that the importance of ‘happiness’ *per se* was agreed upon by the majority of questionnaire respondents. What these close-ended questions often fail to capture, however, is *how* these respondents understand and construct their ‘role’ in promoting students’ happiness. By drawing on the findings from open-ended questionnaires and semi-structured interviews, the following section demonstrates that school-level actors tend to construct their ‘role’ in relation to their interpretation of what they see as ‘happiness’.

7.2.2 Different understandings of happiness and well-being

In both the questionnaire and during the interviews, participants were invited to share their thoughts and understandings of ‘happiness’ and ‘Happiness Education’. Hence, I avoided bringing up any specific definition of happiness myself to minimise the risk of unconsciously imposing specific conceptions of happiness on interviewees. One commonality found across both data sets was that none of the participants brought up the term ‘well-being’ themselves, except for one interviewee (a primary school teacher) who was familiar with the OECD PISA. In general, the term ‘happiness’ was widely prioritised over the term ‘well-being’ or other technical – and more measurable – concepts such as subjective well-being and life satisfaction.

Two *potential* reasons for the lack of use of the term well-being, particularly at the school-level, are as follows: first, the term ‘well-being’ is not translated into Korean as a colloquial term, which explains why the vast majority of the interviewees stated that they have not come across the term ‘well-being’ in their day-to-day school life setting. Only one lower secondary school teacher associated it with a locally specific initiative:

Talks are going around at school sites about student well-being, and these are also often set out in official documents sent by local education offices. In our [*Gyeonggi*] province, for example, pushing back school start times to 9 am has been a big issue. Those who support this initiative point to early school hours as a major culprit of ‘breakfast-skipping’ among students. Some even argue that it [early school start times] infringes on students’ rights to pursue happiness. (Michael, private lower secondary school teacher, 4/11/2021)

But, overall, it was clear that the term ‘well-being’ is largely absent both at the discursive level (e.g., official document from educational offices, curriculum document, faculty meeting) and at the practical level (e.g., day-to-day teaching, assessment, and evaluation). Second, some described the term ‘well-being’ as too broad and vague, and as difficult to define. These reasons, to some extent, echo the critiques of the study of well-being regarding the vagueness existing in the use of terminologies (e.g., happiness, life satisfaction, all-round development) and in what well-being consists of (Jayawickreme et al., 2012), and that ‘[w]hile well-being is commonly connected to notions of health and happiness, the rapid adoption of the term, alongside its multidimensional, subjective nature, creates the risk that it becomes a much celebrated but little understood concept’ (Graham et al., 2016, p. 367).

The responses also revealed two distinctive themes of ‘happiness’ – each of which represents different aspects and meanings of ‘happiness’. First, one of the most frequently emerging themes from the interviews was the understanding of happiness as a ‘destination of the self’ and their role as school-level actors as a ‘guide’ to that destination. This theme focuses on the ‘future happiness’ of students, involving discussion of the typologies of ‘learning for happiness’ and of ‘learning about happiness’. The second theme instead focuses on the ‘present happiness’ of students, wherein the role of school-level actors is articulated largely in terms of providing emotional and psychological support, and reveals elements of ‘learning through happiness’ such as play-oriented activities. At large, their perceived role in promoting student happiness are illustrated in Figure 7.3.

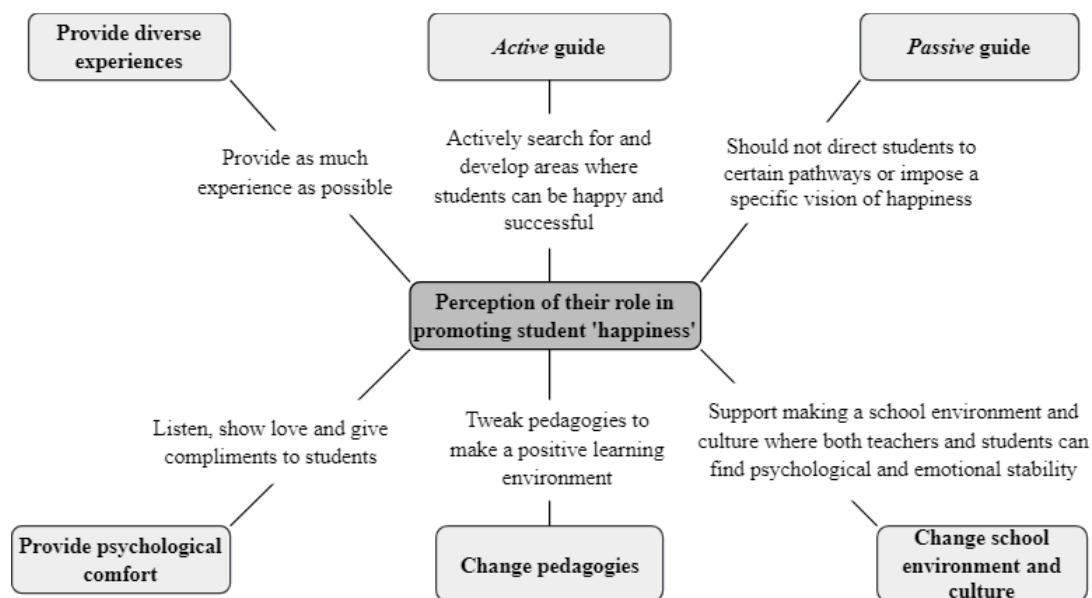


Figure 7.3. School-level actors’ role in promoting student happiness

Future Happiness of students: Happiness as a ‘destination of the self’

The largest proportion of questionnaire respondents (35.7%) described their role as a ‘guide’ or a ‘facilitator’ who helps students find their own meaning and vision of happiness. The notion of ‘self-discovery’ was also visible in four of the ten interviews with school-level actors. There was a general agreement among these responses that happiness is something that cannot (or should not) be taught by rote and can only be discovered by oneself.

When they were asked about the points at which self-discovery occurs, the interviewees made immediate connections with their perceived role of the school or that of themselves. What varied across their responses was the extent of *involvement* in such a process. On the one hand, many felt that school-level actors should not take ‘leading roles’ in actively directing students to certain pathways, and this group of interviewees showed their reluctance in imposing a specific conception or picture of happiness. Michael (private lower secondary school teacher), for example, held the view that the role of teachers is to provide the knowledge and resources necessary for students to fulfil their own vision and targets of happiness and offer a range of pathways students can take. They also explained how their perspective changed over the course of their teaching experience:

It has been over 10 years since I first taught. At first, I used to set specific goals and told students that they could achieve happiness only if they reached those goals. But now I understand the importance of valuing each student’s individuality and encouraging them to set their own goals and happiness. (Michael, private lower secondary school teacher, 4/11/2021)

Also notable across the responses was the idea of ‘experience’ as a ‘window of opportunity’, wherein many of the respondents and interviewees commonly viewed that the role of schools is to provide a wide array of experiences and that schools cannot, and should not, give ‘answers’ to the students. Hyunjun (public lower secondary school teacher), for example, felt that self-discovery comes from trying something new and, hence, sees it as part of their role to constantly expose students to new experiences and encourage them to try out:

I don't think we can give students the answer to what happiness is. Instead, what we can probably do is **provide them with various experiences so that they can figure out the meaning of happiness**. Schools can provide experiences that students cannot get at home or by themselves, for example, through Free Semester Initiative. I think **it is through these experiences one can be equipped with the competence to find out what they truly enjoy and feel happy doing**. (Hyunjun, public lower secondary school teacher, my emphasis, 8/11/2021)

The excerpt above was particularly interesting because they implied that experiences are not only the sources of competence but also of ‘happiness’. Although they did not explicate what they mean by ‘competence’, the belief in the importance of ‘learning for happiness’ shaped their belief in their role as teachers. A similar narrative was found during an interview with another teacher. As stated by one primary school teacher:

Some students refuse to participate in given activities even before giving them a go, so I tell them, “You don't know what you like or what you're good at. That is why you need to experience as much as possible in primary school. One day you might find it more interesting

than you thought. You need to keep looking for what you enjoy the most and what you are good at. **The biggest happiness comes when you do what you enjoy the most.**” (Satto, public primary school teacher, 25/11/2021, my emphasis)

By providing more opportunities to experience something new, these respondents believe that students will have a bigger ‘window of opportunity’ to discover what they enjoy the most.

However, in contrast to the preschool, primary, and lower secondary school-level actors who stressed the importance of having as many as experiences as possible for students to find out what they enjoy or are good at, two upper secondary school teacher interviewees explicitly drew a line between ‘want’ and ‘need’. Emily stated that, as university admissions become an immediate matter at the upper secondary school level, one of their biggest concerns nowadays is the students who do not have a clear purpose in their life and have not had a chance to think about what they like and want to do upon graduation:

I think my role as a teacher is to look after these students and explain to them why they come to school and what they can learn at school. Some just go to university because everyone else does and think it is a natural progression. **As an elder in life**, I think I am the one who **should tell them how they should live the rest of their lives**. (Emily, public upper secondary school teacher, 9/12/2021, my emphasis)

In Emily’s school, there has been no effort made to introduce activities or initiatives that focus on enhancing student happiness. Emily, in fact, specifically attributed the reason for this to university entrance requirements:

There is none. For us, **the priority is to send students to good universities**. What really matters is **what we can put in students’ school life records** which are submitted as part of university applications. Students’ happiness – or activities that students have done for their happiness – does not matter that much in university applications. Let’s say, **if there is some sort of announcement [at the ministry or higher education institution level] that happiness education activities are beneficial for university entrance, all the student records will then be filled up with happiness-related educational activities**. (Emily, op. cit., my emphasis)

As the excerpts above reveal, the nature of education for happiness shifts from providing more opportunities and time for students to search for their interests and passion to explicitly ‘telling and explaining’ them the purpose of education and how they should live upon graduation. These differences suggest that the purpose of education in fostering student happiness is shaped by differences in school and grade levels.

The idea of ‘learning for happiness’ was also illustrated by another group of interviewees who stressed the importance of *providing an enabling environment*, where students can focus on

learning what they truly enjoy. Here, the role of school-level actors was described as providing a ‘platform’ for happiness, not necessarily as embedded in subject matters but by reorganising the school structure in a way that students could benefit more. One example comes from Pandora (private upper secondary school teacher) who works in a commercial upper secondary school.⁵ Pandora noted:

At first, we provided both barista training and patisserie-confectionary courses as part of our afterschool programmes...I was surprised how many were interested in pursuing them as future careers and that was when I realised why some students show no interest in their subject studies. **So we restructured our school departments and introduced a new ‘food service management’ department.** (Pandora, private upper secondary school teacher, 15/11/2021, my emphasis)

They then recalled an anecdote that prompted them to redefine their understanding of student happiness:

One day, one of my former students visited me at school and told me that they got a job at Starbucks. This student, who was always at the bottom of their year group, then told me: “You know, I think I did really well in school”. So I asked why they thought that and their answer really struck me; they said: “Because I felt so happy during my school years learning all about coffee.” I think that was my ‘Aha!’ moment. (Pandora, op. cit.)

What Pandora shared here was reflective of similar views raised by three other interviewees who envisioned ‘Happiness Education’ as both a ‘vision’ and platform that encourages students to first identify their aptitude and then develop their potential so that they could advance towards the career that they really want.

On the other hand, there were also others (albeit fewer) who emphasised the importance of playing an *active* role in guiding students to search for meaningfulness in their life as well as from the experiences they encounter in the course of their journeys. A couple of questionnaire respondents (5.4%) and two of the interviewees mentioned that their role is to *teach* students how to achieve happiness. This group delivered a more *straightforward* – and narrower – conception of happiness and stressed the importance of changing students’ perspectives. One of the teacher interviewees put a strong emphasis on ‘resilience’, arguing that ‘resilience’ is what combines all three types of happiness (‘pleasant life’, ‘engaged life’, and ‘meaningful life’) identified by the famous positive psychologist Martin Seligman (2002). They conceptualised ‘Happiness Education’ as an education that teaches students not to avoid

⁵ Commercial upper secondary school focuses more on encouraging students to directly enter the workforce rather than preparing them for higher education admissions.

challenges and obstacles, but rather perceive them as opportunities and building blocks for personal growth.

It was also clear that their ‘meaning-making’ of happiness was greatly shaped by how these school-level actors viewed the society. Tonky, who used to work as a lower secondary school teacher, expressed a strong view that individuals are often conditioned by both the media and the broader society to conform to ‘small and mundane happiness’:

...I feel like today’s education system pursues one’s success and comfort too much over happiness. I see this as an outcome of excessive competition...society is too competition oriented that it tends to forget about communal values. If I approach this more critically, I want students to realise that they are being sacrificed in such a competitive social system. So rather than becoming and ending up as a consumable, they need to become individual beings who actively pursue their own purpose in life and happiness.

Well, to be honest, the reason why today’s students have difficulties in developing an eye for society is because of teachers. Teachers themselves are not equipped with these ‘eyes’. They worship capitalism and meritocracy – the stuff our society is wrapped up with – and simply teach students how to survive from these. So, what I am saying is that there is a lack of critical assessment of why these systems exist, for example, why they consume people and our lives. (Tonky, former private lower secondary school teacher, 5/11/2021)

When asked what efforts need to be taken, Tonky identified critical thinking as an essential competency that ‘Happiness Education’ must teach:

Well, actually, I would like to talk a bit about Happiness Education. I think the **happiness discourse circulating not just within the field of education, but also in society as a whole, reinforces** the message that **one needs to be contented with small happiness**. TV programmes these days show people enjoying simple lives in the countryside with stability. Through this, we are **brainwashed** that we should be content with living within our means **and that there is no greater happiness**. These messages are delivered throughout society not just by the media but **also by education and are infused into students. It makes people focus on a stable life after retirement, rather than encouraging them to think progressively or critically**.

Although I really hope students can develop a critical perspective on these things, well, you know, they think in a way they learned and teachers hardly question the society they live in. **So that is why Happiness Education these days is about learning how to be contented with living within our means and that that is the greatest happiness one can achieve**. I think the true sense of happiness can only be achieved **when education enables us to open our eyes and realise how many are getting exploited and structurally consumed by the top 0.1-0.2% elite class**, and to **make efforts to** create a more equal and just society. (Tonky, op. cit., my emphasis)

The excerpts above reflect a belief that, unless one is not capable of seeing injustice and acting upon it, their (perceived) happiness is hardly a complete one. Tonky, however, also

acknowledged that they used to be pretty much the same as other teachers – ‘a typical teacher borne of the times we live in, who hardly questions the society they live in’ as they put it. In other words, Tonky implied that the problem lies within teachers, as well as society. A similar narrative was also found during an interview with another primary school teacher, who shared that parents’ anxiety toward society tends to block their children’s happiness:

When I asked my students what they wish to do the most, hanging out with friends, going on a school trip or an amusement park were at the top of the list. What concerned me was the fact that **their parents do not allow them to do such things**, and that is because these parents **are anxious about the safety of their children**.

Recently one of the parents told me that their child was feeling lethargic, refusing to do anything, wearing earphones at home, and avoiding eye contact with their parents. What I learned during the conversation was that the parents never let their child go anywhere by themselves by bus even though the child was in sixth grade...It seems that **the anxiety towards society is so high**. (Ryan, public primary school teacher, 21/11/2021, my emphasis)

The interviewee further explained that these experiences gave them the determination to become a ‘companion’:

...I think of my role as a companion – someone who contributes to **creating a society where children can feel safe wherever they go**. In order to create such a society, both myself and my students must become **trustworthy** people. The ability to have healthy communication with others, in particular, is key to building such trust. (Ryan, op. cit., my emphasis)

These quotes represent the most robust examples of how teachers associated their role in promoting student happiness with wider socio-structural problems. They also demonstrated that ‘happiness’ can be used as a vehicle for a vast range of purposes and visions of education. As will be explained in the coming sections, this implies the existence of a greater structural problem that hinders the development and realisation of their perceived role in promoting student happiness.

Present Happiness of students

If the first theme was oriented around understanding the role of schools and themselves as ‘guiding’ or actively ‘contributing’ to students’ journey to future happiness, the second theme focuses on promoting students’ present happiness at schools. About 19.6% of the survey respondents described their role as providing emotional and psychological support to students. These responses included ‘help students build high self-esteem’, ‘carefully monitor students’, ‘show students how happy I (teacher) am’, ‘show students love and empathy’, ‘give encouragement and compliments’, and many more.

Similar narratives were also present in the interviews as Sunny (public primary school vice principal & former school commissioner) explained:

To me, Happiness Education is about students building their self-esteem and self-efficacy and not comparing themselves with others. It is important they are not feeling sad or devastated because of others – in fact, it is like **having strong muscles**...Well, to me, anxiety and depression are the opposite emotions of happiness. If students are capable of respecting themselves and doing something, that is what I call being capable of leading their own lives and making their own goals. To me, having these emotions equates with happiness. (Sunny, public primary school vice principal & former school commissioner, 2/12/2021, my emphasis)

Interviewees who shared Sunny's conceptualisation of 'Happiness Education' demonstrated different perceptions of their roles compared to those who believed their role is to support students' self-oriented journey to (future) happiness. When asked about their 'know-how' of making a happy classroom or a learning environment, most of the interviewees drew on either their own experiences or practices implemented at their schools. Some provided examples of experiences of introducing new pedagogies, or community- or school-level practices that enhanced student autonomy, sense of achievement, and self-efficacy, whereas others focused on the efforts they made to improve their relationship with students and enhance students' sense of belonging. Satto, for example, shared their 'know-how' in generating positive learning experiences for all students regardless of their different learning abilities:

You know, making students focus and feel happy in learning is very difficult. Lower-grade students, in particular, have a short concentration span and there is quite a large gap in their learning abilities (e.g., proficiency in reading or writing). But nonetheless, you need to teach them altogether; those who are already proficient in the Korean language easily get bored if they are learning stuff they already know, but I cannot teach everyone assuming that they would know the language already. So I would, of course, teach the fundamentals, but add 'fun' and 'challenging' elements to keep everyone engaged. (Satto, public primary school teacher, 25/11/2021)

Satto's approach is reflective of five out of the eight teacher interviewees. While each shared a unique pedagogical approach that they believe is related to positive learning experiences, there was a general consensus among these teachers that their role *inside the classroom* is to lower students' psychological barriers to learning and create opportunities where students can feel a sense of accomplishment and motivation.

The other three interviewees (two teachers and one vice principal) associated 'Happiness Education' with specific policy interventions (e.g., HEP initiatives, Innovation Schools), such as 'WEE (We+Education+Emotion) project' and '(Exam) Free Semester Initiative' (MOE,

2013a). Although their personal conceptions of ‘happiness’ were not necessarily driven by HEP, when it comes to their perceptions of their roles and responsibilities, they implied that there are professional counsellors and support systems for student happiness and psychological comfort – i.e., it was someone else’s job. Apart from these three interviewees, the rest showed scepticism when asked if the implementation of HEP initiatives had any impact on leading and increasing school-level discussion of student happiness. Regarding the Free Semester/Year initiative (FSI), all three interviewees from lower secondary schools responded that while they sympathise with the purpose of the initiative, they are sceptical of its ‘effectiveness’:

It really depends on the school's capacity; for example, organising the FSI depends on the capacity of the person in charge. Also, you know, schools cannot simply give up on students’ academic performance as well. So, if the school does not delicately approach the FSI, we might end up achieving neither the original purpose [encouraging students to develop their dreams and talents] nor good academic performance. That is what the parents and teachers are most concerned about. (Tonky, former private lower secondary school teacher, 5/11/2021)

Schools can choose when they would like to run their FSI – both in terms of semesters and years [Year 7, 8, or 9]. But no one would actually set it up at Year 9 [because it could affect their students’ progression to esteemed high schools and, subsequently, universities]. Schools usually set it up at either Year 7 or 8, but if you ask me, no matter how good the policy purpose is, lower secondary school is too early to start thinking about future careers. (Michael, private lower secondary school teacher, 4/11/2021)

This, however, does not mean that the enactment of the FSI deviated from the government’s discursive promise to promote student happiness. Hyunjun, for example, noted that the implementation of FSI provided them with the opportunity to exercise their autonomy by teaching what they wanted to teach in the regular curriculum:

Our school does a block schedule; that is, we usually run FSI two hours in a row every week. There is no restriction on the activities you can do during this time; for example, if you are a mathematics teacher, as long as they are math related, you can use that time to do what you really wished to teach and try in regular classes. So, during this block period, I try to help students to **get over their mental math hurdles**. I would bring in **some fun, play-oriented activities – instead of getting students to rote learn subject knowledge – so that they can accept mathematics more easily**. (Hyunjun, public lower secondary school teacher, 8/11/2021 my emphasis)

Interestingly, what these interviewees envisioned as ‘Happiness Education’ practices were very much associated with their own understanding of happiness. It was evident that they reflected their perception of happiness in their day-to-day practices in a way that would supplement the core curriculum.

Furthermore, what the majority of interviewees communicated and conceded in their interviews was that providing satisfactory emotional and psychological support requires both

the ‘willingness’ and ‘capacity’ of not only teachers but also parents and school leaders, as also illustrated by Tonky earlier. Their views also echoed several previous works which suggested a ‘whole community approach’ toward student happiness and well-being (e.g., Morse & Allensworth, 2015; Rooney et al., 2015). Moana (public preschool teacher), for example, shared that they spend at least 20 to 30 minutes a day observing children’s daily emotions and behaviours, eat lunch with them on a daily basis and utilise ‘drop off’ and ‘pick up’ times to interact and converse with the parents. Ryan also shared a good example of how being attentive to each student’s needs and circumstances can make a substantial change in a student’s capability:

In our school, there is a student who has very bad eyesight, which makes him difficult to run fast or catch balls. Since he had no muscle strength, I organised small whole-class activities, such as ankle jump rope, which this student can participate in. I always asked if he wants to do it or not and that he can always do something else. Surprisingly, this student kept saying he wants to try again, and eventually, he – who used to barely jump rope for a second or two – managed to jump rope for about a minute in a row. (Ryan, public primary school teacher, 21/11/2021)

In fact, Ryan mentioned that they have been particularly active in ‘tweaking’ not only their own but also other teachers’ pedagogies to make a positive impact on the entire school community. One of Ryan’s favourite happiness-teaching activities is a project where students visit those who are usually ‘behind the scenes’ in schools (e.g., school cleaners, security guards, and school cooks) and interview them. Students are later asked to make a presentation on what these ‘behind-the-scenes’ actors do every day at school and how important their works are. Ryan noticed that not only did the students get the chance to think about the meaning of life, but the school staff, who previously diminished the value of their own works, felt very moved when students came and thanked them, formulating a very good relationship between different school members. This demonstrates that even a small ‘[tweak] in teachers’ pedagogies can have a positive ripple effect across the entire school community’ (Arslan & Burke, 2021, p. 2), and even beyond.

Overall, these interviewees approached the idea of ‘Happiness Education’ as something they need to *untangle* and *materialise* in their own ways; as a non-traditional practice they pursue by spending more (personal) time paying attention to each student, adjusting pedagogical approaches and methods, or even by ‘tweaking’ the curriculum. But, again, gaps can be seen between the ideals (*what they envision*) and realities (*what is compromised at the end*). A

variety of factors of disruption that cause these discrepancies will be elaborated on in the following section.

7.3 Factors of ‘disruption’

When questionnaire respondents were asked if they faced any barriers in pursuing their perceived role in promoting student happiness, only four out of a total of 50 respondents responded ‘No’. Others provided explanations of how their perceived roles are continuously challenged by largely three different obstacles – personal, institutional, and sociocultural factors – and how these obstacles ‘hinder teachers in implementing their beliefs in practice’ (Buehl & Beck, 2014, p. 79). Their perceived barriers are illustrated in Figure 7.4.

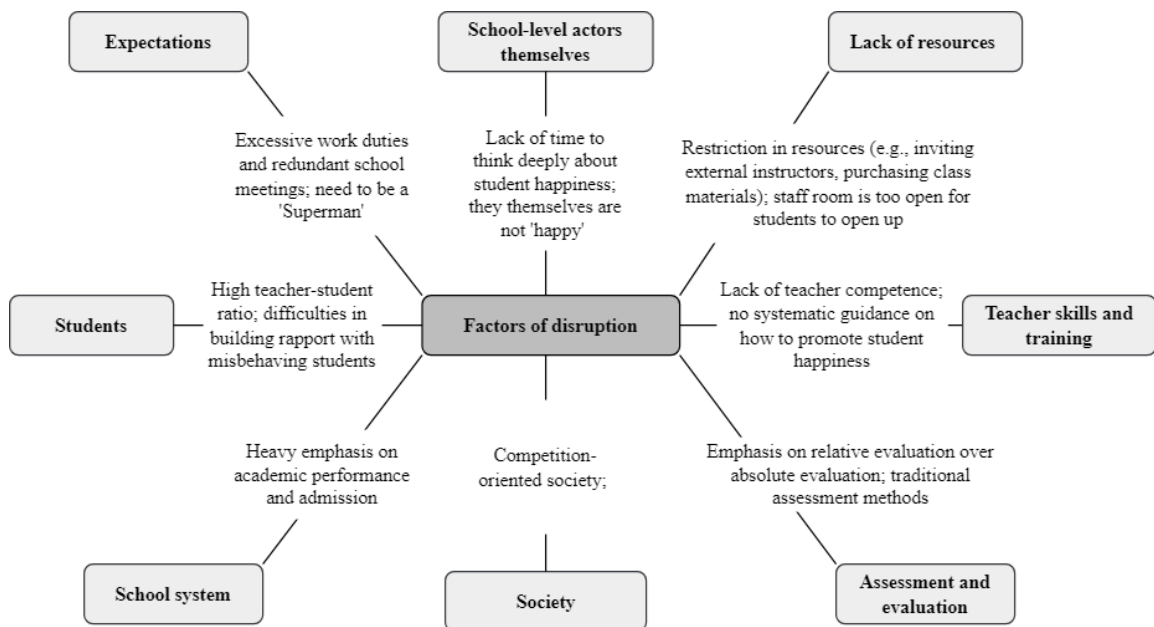


Figure 7.4. Barriers to school-level actors’ role in promoting student happiness

The findings from both questionnaires and interviews suggest that personal and individual obstacles derive from multiple sources. Some refer to their *lacking* skills in, for example, ‘building rapport with difficult students’ or ‘respecting students’ opinions and thoughts’. Other questionnaire respondents expressed their own concerns and fear:

- [1] What I think as happiness may not be happiness from the perspective of students
- [2] Each teacher has a different belief in education, so it is often difficult to find a shared direction [when it comes to promoting happiness]

[3] How students perceive can vary based on their personal situations, so as a teacher, it is unclear to me what it truly means to ‘teach happiness’. There is a concern that emphasising students’ happiness might just be another way of forcefully imposing a specific idea of happiness onto them, like cramming education down their throats

One of the interviewees, Satto (public primary school teacher), also confessed that, even if they agreed to be interviewed, they felt uncertain if they could be of any help as they are ‘not the type of person who would describe themselves as happy’, which suggests the need to consider ways to promote happiness and well-being of teachers as well.

Moreover, regardless of what their perceived role in promoting student happiness may be – e.g., providing emotional and psychological support, changing school environment and culture, ‘guide’ – the vast majority of questionnaire respondents identified a heavy workload and associated stress as the main reason for having limited or no time to put extra efforts to enhance student happiness, which I classify as ‘institutional obstacles’. Nearly 40% of the questionnaire respondents attributed their struggles to (i) psychological exhaustion caused by heavy workloads, involving class preparation, ‘unnecessary’ administrative work and meetings, and managing classroom conflict; (ii) pressure coming from both parents and ‘above’ over grades and good admission results; (iii) high student-teacher ratio; and (iv) lack of teacher competence and an absence of systematic guidance on how to lead students to happiness. Also, in the interviews, there were several indications that interviewees felt they are overworked and that they themselves are not ‘happy’. When asked what the causes of their heavy workloads and ‘unhappiness’ were, interviewees explained:

It is important to consider not only the well-being of students but also the happiness of teachers themselves. During the years when I taught third years (Year 13) consistently, I experienced constant exhaustion and felt tired all the time. I worked until 10 pm almost every day with no monetary compensation. Well, the only worthwhile thing was that my students got the [job] positions they wanted. (Pandora, private upper secondary school teacher, 15/11/2021)

We have to run around all day. One moment we are buried in paperwork, and the next moment we are dashing down the hallway to teach a class. And on top of that, we have to provide one-on-one counselling and keep an eye on the students. It is like being a ‘Superman’. I was actually talking about this with my colleague yesterday that they [‘the above’] are expecting us to be real-life ‘Superman’ or something. It is not easy. (Michael, private lower secondary school teacher, 4/11/2021)

Underlying these narratives is the belief that teacher well-being is critical to students’ happiness. Teacher well-being is widely identified as an important determinant of positive

teacher-student relationships (see Roffey, 2012), as well as of student's emotional well-being and behaviour (Glazzard & Rose, 2020).

Another interesting 'institutional obstacle' was found in two of the interviewees' responses. Moana (public preschool teacher), for example, identified the availability of resources as part of the obstacles in pursuing what they believe to be crucial to students' happy learning experiences:

There are certain art supplies we use at preschools, like sprinkles. They are usually very common items, but also costly [considering the school budget]. I personally like art and **would love to encourage creativity by giving students a wide variety of ingredients**. But, **in reality, we need to limit the number of items children can use, because restocking these items is an expense in itself too**. Well, it is actually a quite funny story – **I sometimes purchased these items with my own money**. You know, they do not actually cost you an *enormous* amount and I really want my students to have various experiences. (Moana, public preschool teacher, 18/11/2021, my emphasis)

On the other hand, Michael (private lower secondary school teacher) raised concerns about the absence of specific curriculum or education programmes in their school that teach students the important values and attitudes to achieve 'collective happiness and well-being'. They brought up Global Citizenship Education (GCE) as an example:

[In our school] GCE takes place as a one-off event where we show students relevant video clips during morning assemblies, encourage them to take a quiz afterwards, and award prizes accordingly. I do believe that it would be **ideal if we can melt it into our everyday curriculum, but that is not very realistic, is it?** (Michael, private lower-secondary school teacher, 4/11/2021, my emphasis)

It can be argued that both Moana and Michael perceived and experienced the gap between ideal and reality. Moana's experience, in particular, demonstrated that personal beliefs and motivations can contribute to reducing this gap between ideal and reality, even if that means more personal expenses.

The final type of obstacle is what I refer to as 'sociocultural obstacles'. These obstacles include the traditional student assessment system, the competition-oriented social environment, or cultural norms:

[1] The reality is ahead of the ideal. In many cases, exam-oriented curriculum hinders other important educational aims like happiness. In fact, these ultimate educational values like happiness would gradually appear positively in one's life over a long period of time. In reality, however, the priority in school education becomes a realistic one, such as university entrance

examination outcomes, which are the yardstick of schools' performance. (Questionnaire response)

[2] But as the students proceed from primary, and lower-secondary into upper-secondary schools, the school culture gradually gets admission- and result-centred, and their belief in their own capability changes. For example, if students perform poorly on their exams, they then draw the line on what they can and cannot do. It is during this process that their self-esteem, self-efficacy, and happiness go down. (Sunny, public primary school vice principal & former school commissioner, 2/12/2021)

These obstacles were most frequently mentioned across both questionnaires and interviews and were often referred to as the biggest impediment. Hyunjun (public lower secondary school teacher), for example, argued that, 'in the end, any teaching and learning processes revolve around the nature of the student evaluation system'; that is, unless the country finds a solution to its overreliance on conventional high-stakes standardised testing, there will be no room for teachers to pursue pedagogical innovation.

To summarise, it was notable in both questionnaires and interviews that, although school-level actors see promoting student happiness as one of their roles, they do not see the present school system as an *enabling environment* for them to actualise their visions and roles. Their perceived capabilities and what they envision doing as school-level actors seemed to have been 'bounded' and compromised by the exigencies of their day-to-day work demands and sociocultural norms and atmosphere. The following section, therefore, seeks to explore school-level actors' 'unbounded aspirations' by asking what they *want* to do instead of what they *perceive* they should do.

7.4 Thinking outside the box: *What if?*

The sections above demonstrated how participants' perceptions of their role(s) were often conditioned by contextual determinants. This section explores, if such personal, institutional, and sociocultural factors are removed, how school-level actors would approach the matter of enhancing student happiness. The final question I asked in every interview was: 'If you are given an opportunity to design a programme that promotes student happiness with sufficient support and resources, what would that be?'. The participants were also asked to elaborate on: (i) whether the said programme would be a one-off or a continuing event; (ii) specific

elements (e.g., actors, resources) that are essential in the programme; and (iii) what the programme's main focus and priority would be.

The responses ranged from teaching something students *want* to learn – instead of what they *need* to learn – to running a 3-year milestone project that gives students both time and opportunities to think, design, and eventually, develop their interests. Their responses can be grouped into four distinct themes as below:

- [1] Changing teaching content and method
- [2] Running a 3-year project (from planning to materialisation)
- [3] Active collaboration with local communities
- [4] Giving autonomy to students to decide what they want to study and open up room for them to develop and materialise their interests (e.g., learning pop music, running exhibitions, student-run school festivals)

It should also be noted that several responses touched upon more than one theme. For example, Emily, who is an English teacher in an upper secondary school, focused on changing students' learning experience *inside* the classroom. They explained that they would first carry out a 'needs analysis' of students:

I want to teach the English that children are interested in learning. For example, if they wish to learn pop songs, I want to teach them pop songs. If they wish to practise speaking English, I would love to organise a programme where they can talk to foreigners. If they wish to prepare for the TOEFL exam, I can arrange that as well. Basically, the goal of this programme would be to create an environment where **children can choose what they want to do and feel supported.** (Emily, public upper secondary school teacher, 9/12/2021, my emphasis)

The necessity of a needs analysis was also echoed by Michael, another English teacher in a private lower secondary school. Michael envisioned implementing two different programmes: one that takes place *outside* the classroom and the other *inside* the classroom:

[1] The first thing I would do is a needs analysis of students. So you need to first look into what students need and what happiness is to them. But I think students would have a hard time answering if I simply ask what happiness looks like to them. So I will probably ask them two questions: (i) when do you feel the happiest; and (ii) what makes you feel the happiest. Ideally, this programme will take place either once a month or every two months, and it would be a full-day event – maybe we can call it a 'Happy Day' – where **everyone, both teachers and students, can participate, co-create, and feel fun.** You know, I mentioned earlier that I will ask students what makes them feel happy. I think we can use their responses and encourage them to run booths at this festival. For example, if cooking is what makes them the happiest, they can collaborate with their teachers and run a cooking booth. (Michael, private lower secondary school teacher, 4/11/2021)

[2] What I gathered from other teachers recently is the importance of **game-based learning**. So these days, I am very interested in games. I do not necessarily mean by ‘computer game’, but, you know, various games [like card and board games]. I have been utilising various types of games in my after-school programmes, and **I noticed how immersed and happy students become**. Well, that might be why they are so into computer games. I think **introducing game-based learning in each subject** would be the key. In short, I would like to come up with a year-long program **where students can be happy and have fun no matter what they are learning**. (Michael, op. cit., my emphasis)

What seemed to be agreed upon between the two teachers is that to foster a ‘happy learning process’ through pedagogical changes, a strong grasp of students’ needs and interests is essential. Also, although many responses emphasised the importance of students taking responsibility and autonomy of their own learning processes, what was evident in these responses was that teachers should still play a directive role in the learning processes, particularly in regard to providing an enabling environment for students to experience a positive learning process.

Another interesting, and quite similar, approach was found during the interviews with Moana, Sunny, and Tonky, all of whom imagined designing a programme that adopts ‘place-based learning’. According to Herodotou et al. (2019), place-based learning is not only about learning different physical localities, but also about delving into ‘the social and cultural layers embedded within neighbourhoods; and engaging with communities and environments as well as observing them’ (p. 6). What these interviewees suggested was a programme where students can learn about and engage with local communities, albeit with different elements of focus. Moana (public preschool teacher), for example, emphasised the idea of learning *beyond* the classroom through community engagement:

I would like to try bold and adventurous things. I am personally interested in Reggio Emilia Approach and what this approach promotes is ‘**community involvement**’. That is what I want to try out...For example, if we can hang the curtains that the children made in the preschool in an opera theatre, I think children can develop their **confidence, self-efficacy, and sense of belonging by learning that they can make an impact in their community**...and it is also about **going beyond the physical boundaries of the preschool**. (Moana, public preschool teacher, 18/11/2021, my emphasis)

Sunny (public primary school Vice Principal) also envisioned expanding the extent of community involvement. They noted that their previous efforts to implement project-based activities through collaboration with ‘village teachers’ have gone to no avail as the classes turned into another form of didactic approach to teaching, rather than fostering student agency in learning. Tonky’s (former private lower secondary school teacher) programme, on the other

hand, focused on learning about and getting to know the social surroundings. Tonky proposed a step-by-step programme where students can meet people beyond their locality and reflect on what needs to be changed, individually, socially, and globally, for them to achieve a happier life.

What was hinted at in Sunny's interview – and, in fact, mentioned by several other interviewees – is that the starting point of every programme should be 'teachers'; that is, no matter the extent of resources unless teachers are 'ready', both energy- and capacity-wise and have collective consensus and mindset, such a programme would hardly be sustainable and is bound to fail. Ryan (public primary school teacher) also illustrated a similar point. Ryan proposed to design a programme that encourages communication across different school-level actors:

I think the first and the most important step is to discuss frankly and freely with my colleagues [school teachers] in regard to what kind of education we want to provide to our students, what impact we can make, and what and how we should teach them. One of the things that struck me when I attended a professional development programme on Nordic education was that they openly talk about the educational philosophies of their school members. In Korea, [speakers of professional development programmes] only talk about the national curriculum – or something about competency-based curriculum – which has no use. It only makes us teach mechanically.

So after we [teachers] have a full grasp of the picture of education we collectively envision, the next step will be to communicate this vision to parents. Next, I think it is important to ask students about their visions of 'happiness' and 'Happiness Education'. The happiness that students think of may be in some ways materialistic, and some may see it in a spiritual sense. **But instead of such 'relative happiness' that can be shaped by external factors, I think we should focus on thinking about what is necessary for achieving long-term happiness in life.** Maybe we can use an entire month of March to ask and discuss with students what each of us can do to maintain happiness for long periods of time. (Ryan, public primary school teacher, 21/11/2021, my emphasis)

What was clear, overall, was that this 'imaginative exercise' was something school-level actors have not previously experienced and come across in their daily school lives. The exercise allowed the respondents to 'think outside the box' and focus solely on their aspirations. When such obstacles were lifted, interviewees seemed to feel more comfortable and confident in narrating what they 'wished to do before'. Some mentioned that the programme they suggested was at the back of their mind for a while, but that they just have not had enough opportunities – and capacities – to actually materialise them.

7.5 Conclusion

Both questionnaires and semi-structured interviews with school-level actors revealed the following points. First, the meaning of ‘happiness’ understood and constructed by school-level actors varied by temporality. Those who associated the notion with ‘future’ described it as a ‘destination of the self’ and their role as a ‘guide’ to that destination, whereas others associating it with ‘present’ articulated ‘happiness’ in terms of a positive emotional state and their role as being more attentive and making learning more enjoyable. It is also important to note that most of the interviewees had a good grasp of the conception of happiness articulated ‘from above’ through HEP, and were capable of separating this from their own constructions of happiness, which sheds light on the agency of school-level actors as active ‘recontextualising’ agents of knowledge, as Bernstein (1990) described, with relative autonomy and agency to disrupt official discourses ‘created and dominated by the state and its selected agents and ministries’ (Singh et al., 2013, p. 468).

Second, practical changes in school culture and classroom realities following the HEP are not only lacking but often are heavily dependent on school-level actors’ respective understanding of what happiness means and of the perception of their role in promoting student happiness. Although the majority of the questionnaire respondents and the interviewees acknowledged that promoting student happiness is part of their professional role, there was also a consensus that their role in promoting student happiness is often overshadowed and constrained by a range of personal, institutional, and sociocultural factors. Most notably, they identified unmanageable workloads and a lack of consensus on the meaning of student happiness as some of the biggest challenges in pursuing their role. This also demonstrates that their autonomy as ‘pedagogic’ recontextualising agents is bound to their continuous evaluation of the pedagogic discourse of happiness transmitted from ‘above’ and the circumstances they are in through which they materialise their beliefs into pedagogic practices (Winter & Linehan, 2014). Further support and attention thus need to be considered for pedagogic actors to maximise their role in promoting students’ happiness.

Lastly, their pedagogic practices were conditioned by a variety of personal, institutional, and sociocultural factors. When the participants were invited to share their ‘know-how’ and

experiences which they define as 'Happiness Education', and what they aspire to do in the future if conditions are permitted, their 'imagination' expanded considerably. Most of their responses were also surprisingly realistic and cost-effective; however, although many interviewees supported and even strongly emphasised the importance of giving more autonomy to students in their own learning processes, they also believed that teachers should play a directive role in guiding their learning processes and reflected their subjective perception of what an enabling environment would look like.

Chapter 8 Conclusion

8.1 Introduction

The preceding chapters have examined the ways in which different education policy actors understood and reappropriated the notions of ‘happiness’ and ‘Happiness Education’. They also revealed the ‘floating’ nature of happiness as a policy signifier, where the *seemingly* humanitarian and utopian visions embedded in the signifier played an effective role in prompting major education reforms without evoking strong opposition. Three research questions have guided this thesis: RQ1. How and why is the notion of happiness promoted in the field of education policy (**Chapters 2, 3, and 5**), and how has it been framed in the OECD’s education agenda over the past decade, and why? (**Chapter 5**); RQ2. How and why was Happiness Education Policy (HEP) promoted in South Korea and what conception of happiness did it embody? (**Chapter 6**); and RQ3. How do school-level actors (teachers, school leaders and education professionals) understand student happiness and well-being and their role in promoting them, and why? (**Chapter 7**)

In this chapter, I revisit the previous chapters and explain how they answer the three research questions. By drawing together these findings and conclusions, I respond to and reflect upon the overarching question (*How do different education actors interpret and relay the meanings attributed to happiness?*) and explain how this thesis contributes to the extant literature. After this, I address the limitations of this research and propose avenues for future research. Finally, I look at how the OECD’s recent introduction of PISA 2022 Creative Thinking resembles its earlier promotion of student happiness and well-being, as well as the incumbent President Yoon Suk Yeol’s right-wing People Power Party government (2022–present) and its key education reform policies.

8.2 Chapter summary

I opened **Chapter 1** with the caveat that a narrow functionalistic focus on global competencies and 21st century skills is continuously sustained and strengthened by the promotion and assessment of a range of *seemingly* ‘humanistic’ and less instrumental

educational visions and initiatives, such as GCE, Lifelong Learning, and creativity (see Elfert, 2017, 2023; Grey & Morris, 2022; Oxley & Morris, 2013). I proposed the notions of ‘happiness’ and, more generally, ‘well-being’ as representative but understudied examples of such humanistic education projects and argued that these notions as policy signifiers are often subject to political legitimacy constraints of both IOs and national policymakers and politicians. Later in the chapter, I elaborated on the major research questions, how this research is situated within the comparative education paradigm and the Comparative Case Study framework, its potential contributions to the extant knowledge and the literature, and the thesis structure.

The two ‘review’ chapters – **Chapters 2** and **3** – revealed how and why the notions of student happiness and well-being are promoted in education policies. Through **Chapter 2**, I situated this thesis within relevant bodies of literature which have oriented and framed the thinking of this research, ranging from policy signifiers, different disciplinary approaches to happiness, the ‘global turn’ of education and the role of IOs, the educational convergence thesis and its critiques, and sociotechnical imaginaries. The chapter first drew on the literature on public policy to understand how meanings are constructed and attached to policy signifiers. Then, by mapping out various conceptual underpinnings of the term ‘happiness’ (e.g., eudaimonia, hedonic and utilitarian happiness, subjective well-being), I explored the polysemic nature of the term ‘happiness’ and suggested that ‘happiness’, as a floating policy signifier, slides between distinctive – and sometimes contradicting – forms and directions as per the society’s broader political and economic agendas and ideologies.

Several points were raised in the rest of the chapter. First, by drawing on the literature on international relations and global education governance, I examined the role of IOs in shaping global education agendas and national policymaking. Here I highlighted the relevance of the constructivist perspective for understanding the mechanisms IOs use to legitimate their authority in education policymaking (see also Li & Morris, 2022) and suggested that the growing interest among the IOs in employing a ‘humanistic’ framing of education in the arena of global education policymaking may go hand-in-hand with the ‘waning’ national interest in International Large-Scale Assessments (ILSAs) such as TIMSS, PIRLS (Progress in International Reading Literacy Study), and the PISA (Jerrim, 2023), which Sorensen et al. (2021) also described as ‘PISA-fatigue’. This links to the point I raised in the paragraph

above, that by using a term that one cannot disagree with (e.g., happiness, well-being, lifelong learning, global citizenship), IOs – especially the OECD, which, unlike the United Nations, European Union or World Bank, wields no legal instruments or financial levers to exercise power and influence over underdeveloped countries – sustain their role in shaping the education policy agenda.

Second, I demonstrated that the polysemic nature of the term ‘happiness’ opened up the room for resignification across different levels and over time (Beech, 2009). Here I explored the ideas of ‘externalisation’ (Schriewer, 1990, 2003), ‘policy referencing’ (Waldow et al., 2014), and ‘sociotechnical imaginaries’ (Jasanoff & Kim, 2009) to demonstrate the involvement of different domestic policy actors (e.g., politicians, policymakers, media, corporations) in determining and validating their desired policy directions. In so doing, I provided a basis for understanding the ways in which the meaning(s) of ‘happiness’ become grounded in political and economic contexts. Then, I referred to the cultural anthropological perspective in the comparative education literature to demonstrate the complexity and cultural contingency of policy ideas (Anderson-Levitt & Gardinier, 2021).

The review of these bodies of literature was then followed by a review of major education reforms in four East Asian societies (Japan, Singapore, China, and Hong Kong) (**Chapter 3**), which illustrated the political and economic background to the emergence of national education reforms and policy initiatives and how each society sought to address the issues of low levels of student happiness and well-being. This revealed the divergence in the original impetus for reform across the four countries. For example, the Japanese case of *yutori* reform was introduced following the country’s recognition of the need to develop students’ cognitive abilities (e.g., the ability to identify problems, to make independent judgements) and socioemotional dispositions at the turn of the 21st century. Singapore’s TSLN reform, whilst similar to Japan’s *yutori* in what it emphasised, more explicitly aligned its objectives with the need for ‘human capital upgrading’ and cultivating ‘good citizens’ in the face of the new century. These two reforms also greatly differed from the original impetus behind China’s double reduction (*shuang jian*) policy introduced in 2021, where its objectives were more closely aligned with the idea of promoting students’ psychological and physical well-being and promoting educational equity amongst all students.

Chapter 3 also revealed how their initial impetuses and motives – with the exception of China – shifted over time. For example, Japan’s *yutori* initiatives (e.g., reducing schooling days and hours and introducing project-based learning) initially emphasised ‘student unburdening’ and a ‘competency-added’ approach to education (see also Cave, 2023). However, as the reform faced severe criticisms for deteriorating students’ academic abilities based on the PISA 2003 results, MEXT not only restored the reduced amount of subject content, instructional hours, and homework but also gradually turned the reform into a mesh of disparate initiatives and ideologies (e.g., internationalisation, creativity, patriotism) to harness the different political and economic objectives of different stakeholders (Cave, 2007). In Singapore, the ideas of student happiness and well-being came to the fore as a motive later with the proposals of the TLLM initiative in 2005 and Character and Citizenship Education in 2012, wherein even these two initiatives differed in the meanings ascribed to student happiness and well-being. Hong Kong’s *Learning to Learn* reform provided a more distinctive case; that is, although it emphasised ‘holistic education’ and ‘all-round development’, unlike other East Asian societies, the reform did not employ more specific meanings of happiness, such as ‘unburdening’, ‘social and emotional learning’, well-being, and ‘freedom’. Nonetheless, the initial impetus of the *Learning to Learn* reform was congruent with that of Japan, Singapore and Korea, seeking to address social concerns towards a competition-oriented rote-learning system and rigid textbook- and teacher-oriented pedagogies. It is yet unclear if there has been a shift in the objectives of China’s double reduction policy, mainly due to it being a relatively ‘new’ reform introduced in 2021.

Chapter 4 outlined the epistemological, ontological, and methodological considerations undertaken in this research. I first explained how an interpretivist-constructivist approach enabled me to develop a research design that focuses on and reflects how different education policy actors constantly reconstruct and ‘make sense’ of knowledge and social reality. The second part of the chapter provided a detailed overview of the data collection and analysis for each level of actor and identified a range of ethical and methodological challenges I faced throughout the research. Both the interpretivist-constructivist approach and the methodologies I adopted (i.e., documentary sources, semi-structured interviews, questionnaires) were crucial in unmasking the ‘hidden’ narratives, especially the politics and power relations within and beyond schools, the Korean government, and the OECD, the role embedded culture plays in the ‘meaning-making’ of student happiness and well-being, and

how the broader political, economic, and institutional missions shape the subjectivities of the actors.

I opened **Chapter 5** with a historical overview of how the OECD's education agendas have shifted since its inception in the 1960s. Here I identified at least two major turning points in both the development of the OECD and its approaches to education from the rise of the 'economics of education' and later the new 'social contract' between the 1960s and 1980s to its shift towards the 'comparative turn' in education policymaking and the rise of PISA from the 1990s. The rest of the chapter is devoted mainly to this recent period between the 1990s and 2010s, where I argued that the emergence of the OECD's happiness and well-being policy initiatives needs to be situated within what Li and Auld (2020) described as the 'humanitarian turn' of the OECD, coupled with the publication of the 'Sarkozy Commission' report followed by at least five different 'spin-off' events. Here I analysed the OECD's humanitarian turn, particularly its turn to the notions of happiness and well-being, as a new *educational gesture* driven by the need to 'rebrand' much-criticised logics of human capital and neoliberalism (Auld et al., 2019) by expanding its measurement schemata to the non-cognitive outcomes of learning.

Chapter 6 focused on the emergence, manifestations, and enactments of the notion of 'happiness' in education policies in Korea. I opened the chapter with a brief overview of party politics in Korea to avoid any confusion from the use of 'left' and 'right' wing terminologies. I then explored various contextual backgrounds to understand what happened prior to the 2012 Presidential election, where I found that the rise of 'happiness' discourses in the 2012 Presidential election was closely linked to the political, economic, and sociocultural turmoil at the time. The public's dissatisfaction towards the right-wing Lee Myung-bak government (2008-2012) was coupled with the country's poor performance in the global comparative metrics on happiness and well-being (i.e., the OECD Better Life Initiative), which soon served as the leverage for both the right-wing and left-wing presidential candidates to pick up similar policy keywords, such as economic democratisation, educational welfare and equity, student freedom, creativity, and character development.

Through an analysis of official state-level documents, transcripts of presidential speeches, and interviews with Korean policy intermediaries, I demonstrated that the term 'happiness'

as a policy signifier in Korea: (i) embodied a range of promissory and anticipatory narratives, providing legitimacy to sustain or introduce controversial policies such as Specialised High Schools and the Free Semester/Year Initiative; and (ii) was subjected to continuous resignification with new and often disparate meanings that were used to support the broader political and economic objectives of the government, particularly its sociotechnical imaginaries of the future.

Chapter 7 addressed school-level actors' understanding of and their perceived role in promoting student happiness. This chapter demonstrated that, among various aspects of development, school-level actors perceived 'moral and social development' and 'physical development' as the most important aims of education. In contrast, the participants believed that both intellectual development and aesthetic development are of less importance than other aspects of development. The vast majority of respondents perceived promoting student happiness as the most important aim of education; the varying aspects and meanings of happiness (e.g., personal growth, purpose and meaning in life, hedonic happiness) did not affect their responses. One notable finding when compared with **Chapters 5** and **6** was that school-level actors perceived 'creativity' (ranked 31st), 'knowledge of the Fourth Industrial Revolution' (ranked 36th), 'competencies essential in the labour market' (ranked 39th) as the *least* important out of a total of 40 different aims of education, highlighting the possible gap between policy discourses and school-level actors' perceptions and practices in their daily school lives. Moreover, although school-level actors perceived promoting student happiness as one of their roles, they perceived a range of 'barriers' in putting the role into practice and argued that addressing these barriers at both policy and practice levels would be crucial in providing an enabling environment for school-level actors to exercise their role.

8.3 Key arguments and contributions to the literature

In **Chapter 1**, I presented the following overarching research question: *How do different education actors interpret and relay the meanings attributed to happiness?* In this section, I discuss how the findings and key arguments of the previous chapters address each research question and how they contribute to the extant literature and knowledge.

RQ 1. How and why is the notion of happiness promoted in the field of education policy, and how has it been framed in the OECD’s education agenda over the past decade, and why?

To answer the first research question, I present my findings and arguments with reference to **Chapters 2, 3, and 5**. What marked the turn of the 21st century was a series of ‘side effects’ of capitalism, such as a heavy emphasis on materialism and (selfish) individualism, exacerbating socioeconomic inequality, and the resulting environmental degradation. These side effects brought in new questions of what ‘development’ means and what nation-states should prioritise. The findings presented in **Chapter 5** illuminated that, when in 2008 then French President Nicolas Sarkozy and his Commission voiced their concerns towards ‘GDP fetishism’ (L. Davies, 2009) and called for a measure of ‘well-being’, there came greater political awareness and ambition to ‘redefine’ development by including and promoting sustainability and individuals’ more *qualitative* aspects of well-being such as but not limited to, social relationships, political engagement, and satisfaction with life.

This thesis revealed that the emergence of ‘happiness’ as an education policy signifier is situated within such a global call for promoting well-being. **Chapter 2** shed light on the role that ‘humanistic’ policy signifiers play for IOs to increase their political visibility and ‘deflect’ criticisms – particularly in the case of the OECD – of their long-standing promotion of human capital and neoliberalism in education. Hence, I pinpointed the relevance of the constructivist approach to understanding the role of the OECD in global education governance, and that the OECD’s promotion of student happiness and well-being needs to be understood as part of the Organisation’s long-term strategic plan to secure and expand its political legitimacy over nation-states (**Chapter 5**).

By tracing the emergence and development of the OECD’s happiness and well-being education initiatives, I demonstrated that these notions of happiness and well-being emerged as ‘floating signifiers’ that are flexibly (re)interpreted per the OECD’s shifting broader political and economic agendas. I argued that using humanistic floating signifiers was crucial for the OECD to reposition and extend its role and legitimacy beyond its narrow measurement of and focus on cognitive skills (Li, 2021). By measuring student happiness and well-being through PISA, the OECD effectively broadened its self-proclaimed spectrum of *what can be measured* under the belief that ‘what is not measured will not be improved’ (Schleicher, 2021,

n.p). Such an expansion of technical-rational expertise towards the non-cognitive domain of learning outcomes then enabled the OECD to reposition its role by proactively – and even assertively – stressing the importance of ‘happiness’ and ‘well-being’ in future societies. By analysing the narratives that run through the Education 2030 project and the SSES, I found that, unlike their humanistic portrayal of ‘happiness’ and ‘well-being’ as the *shared* vision of the future, what the OECD was essentially promoting was the ‘skillification’ of student happiness and well-being. In other words, the OECD’s long-standing logics of human capital and neoliberalism remain *business as usual* – just rebranded with new humanitarian frames, which essentially ‘legitimat[e] the need for creative and happy human capital’ (M. J. Kim, 2022, p. 3).

Through **Chapter 3**, I offered a different reason why the notions related to ‘happiness’ (e.g., mental health, well-being, social and emotional competencies) emerged and are continuously promoted in national education policies. As the education reforms and policy initiatives in the four East Asian societies (Japan, Singapore, China, and Hong Kong) have demonstrated, these notions served as floating policy signifiers that can be readily attached to and harnessed in different political and economic agendas (e.g., internationalisation, nationalism and patriotism, 21st century skills). As such, although these societies employed the notions of student happiness, mental health, life satisfaction, and well-being in their education reforms, a closer look at the narratives presented in their national education reforms and curriculum documents revealed not only a substantial degree of ‘divergence’ in their meanings following their enactment but also a tendency of ‘educationalising’ social problems and transferring responsibilities of these problems to schools (Smeyers & Depaepe, 2008) – a tendency which was also evident in the OECD education agendas (**Chapter 5**).

In short, what I revealed across **Chapters 2, 3, and 5** is that the use of the notion of ‘happiness’ as a policy signifier is a case in which individuals’ psychological characteristics and qualities (e.g., satisfaction, motivation) are politicised and capitalised on by different policy actors.

RQ 2. How and why was Happiness Education Policy (HEP) promoted in South Korea and what conception of happiness did it embody?

The findings and key arguments for this second RQ mainly derive from the second analysis chapter (**Chapter 6**). As I demonstrated in the chapter, the ways in which the notions ‘happiness’ and ‘Happiness Education’ were promoted and discussed in presidential speeches and policy documents were central to determining how these notions are projected into public space.

First, throughout the chapter, I identified several key drivers behind the emergence of the ‘happiness’ discourse in Korea. First is the public’s perception and belief that the country is in a ‘crisis’, both economically and educationally. This ‘crisis’ framing was well-supported and facilitated by the country’s underperformance in the global happiness rankings, most notably the OECD’s BLI, constituting what Kingdon (2011) described as the ‘problem’ stream. The problem stream soon merged with the ‘political’ and ‘policy’ streams – each of which was more or less an independent driving force – where the former was marked by timely political events, such as the 2008 mass protests against U.S. beef imports triggered by mad cow disease, which occurred against the background of talks concerning the U.S.-Korea free trade agreement, the rapidly declining popularity of the right-wing Lee government’s approval rating, soon followed by the 2012 Presidential election. Both the right-wing NFP candidate Park Geun-hye and the left-wing DPK candidate Moon Jae-in were expected to come up with urgent and adequate policy actions to solve the policy problem. In other words, the implicit political bipartisanship over their common emphasis on ‘happiness’ derived from the shared, urgent need to address and ‘soothe’ the public’s dissatisfaction and anxieties. The notion of ‘happiness’ hence emerged as a humanistic and utopian solution, where a series of ‘horizon scanning’ and references to what each party believed as ‘best practices’ elsewhere took place, predominantly from the Nordic countries (see **Chapter 1**; Bamberger & Kim, 2022).

Two different narratives were strongly embedded in the HEP reform documents introduced under the right-wing NFP government (2013-2017). The first is the discursive portrayal of HEP as a ‘safety net’ where students can ‘freely’ navigate and explore their interests. This narrative embodied a series of humanistic notions of happiness, such as ‘freedom’, ‘educational equality’ and ‘whole-person education’. The second, and more dominant, narrative aligns the meanings embedded in the notion of ‘happiness’ with the national visions of the future. Central to these visions were the government’s sociotechnical imaginaries

(STIs) of the future economy and the fourth industrial revolution (4IR); that is, the ways in which the importance of cultivating ‘creativity’ is articulated in the documents reveal that instead of the intrinsic and romanticised vision of creativity as ‘self-expression’ (Fryer & Collings, 1991), creativity is promoted in an instrumental way (i.e., creative ‘problem-solving’, innovation) that binds its meaning to ‘the future needs of the workforce without questioning substantive issues’ (Gibson, 2005, p. 148).

The promissory connotations embedded in the emancipatory and humanistic discourses of ‘happiness’ enabled the two governments to preserve their ‘welfarist ambitions’ as providers of HEP as a ‘public good’ (T. Kim, 2004; M. J. Kim, 2022) while at the same time to lay the ground to construct a vision of an ‘ideal citizen’. The reiteration of Article 10 of the Constitution with an emphasis on the ‘right to pursue happiness’ also demonstrated the left-wing DPK government’s (2017-2022) promise for the pastoral role of the state.

However, similar to the right-wing NFP government, the ways in which the DPK government articulated ‘happiness’ increasingly became muddled with its gradual resignification of its flagship signifier ‘innovation’ to embody imaginaries of what the talented workforce of the future would look like. It is through the latter that the country’s techno-developmental STIs narrowed down the meanings attributed to ‘happiness’ to the instrumental and functionalistic focus on the key competence and skills that are valued in the future of work.

RQ 3. How do school-level actors (teachers, school leaders and education professionals) understand student happiness and well-being and their role in promoting them, and why?

This final research question specifically focuses on school-level actors and their understanding of student happiness and well-being and their role in promoting them. Through **Chapter 7**, I demonstrated the disjuncture between macro-level policy rhetoric on student happiness and well-being (as shown in **Chapters 5 and 6**) and the micro-level understanding and practices at schools. The chapter revealed how the understanding of the meanings of ‘happiness’ and ‘Happiness Education’ among school-level actors varies based on their belief in the role of education and their view of society. While the vast majority of questionnaire respondents and interviewees agreed that ‘happiness’ was the foremost aim of education, their

understanding of their ‘role’ in promoting student happiness differed markedly according to what they understand as ‘happiness’.

First, school-level actors who understood happiness as a ‘destination of the self’ perceived their role as facilitators and guides who support students for their ‘future happiness’. Specific practices and experiences they referred to reflect the typologies of ‘learning for happiness’ and ‘learning about happiness’, which included: providing more opportunities to experience something new; reorganising the curriculum and other school programmes in accordance with students’ career interests; and ‘tweaking’ their pedagogies and organising activities where students can think about the meaning of life and make a positive impact on the entire school community.

Second, school-level actors who focused on the ‘present happiness’ of students articulated their role in terms of providing emotional and psychological support in day-to-day school life and related their perceived ‘Happiness Education’ practices accordingly. The practices they articulated – e.g., integrating fun and playful activities into teaching, and encouraging students’ autonomy, self-efficacy and self-esteem – largely resonated with the idea of ‘learning through happiness’ by lowering students’ psychological barriers to learning and fostering a happy learning environment.

One of the prominent themes identified in the chapter was the various factors of disruption that hinder school-level actors from exercising their *perceived* role in promoting student happiness. These factors were categorised into three groups: (i) personal; (ii) institutional; and (iii) sociocultural factors. First, many school-level actors, regardless of years of experience, school type, or grade level, mentioned that they felt that they lacked the skills to respect students’ opinions and attend to their needs. Some even acknowledged that they are not happy and are concerned that they are imposing their understanding of happiness on students. Oftentimes, these personal barriers were found to be associated with workplace stress, where nearly 40% of the questionnaire respondents identified institutional barriers, such as heavy administrative duties, the availability of resources, class size, and lack of teacher guidance on how to promote students’ happiness, as obstacles to their role. Lastly, I found that exam-oriented curriculum, traditional assessment methods, and school culture norms were seen as the major sociocultural barriers to the promotion of student happiness.

The final section of **Chapter 7** demonstrated how school-level actors' beliefs and perceived capabilities have been 'bounded' and compromised by the challenges they confront in their day-to-day school lives. It is also important to note that when these barriers were lifted through the 'thinking outside the box' activity, the respondents expressed their visions of 'happiness' and 'Happiness Education' much more concretely. Their responses varied, ranging from aspirations of enacting new pedagogies, designing and running a long-term project to ensure meaningful learning experiences, and engaging with local communities. What was interesting in these responses was that, although enhancing student autonomy was emphasised across the responses, their conception of 'student autonomy' was narrow, where many perceived their role as providing 'procedural autonomy support' (Stefanou et al., 2004), for example, by giving autonomy to students to decide what they want to study and open up room for them to develop and materialise their interests. Other dimensions of student autonomy, such as 'organisational autonomy support' (e.g., student autonomy over classroom management) and 'cognitive autonomy support' (e.g., encouraging students to evaluate their own and peers' work), were not thoroughly considered (ibid.). Also evident was the underlying belief that teachers should play a directive role in guiding the learning processes, where they openly reflected their subjective perception of what an enabling environment should look like.

Now, to provide a straight answer to the overarching question:

How do different education actors interpret and relay the meanings attributed to happiness?

Throughout this thesis, I demonstrated the rise of happiness as a policy discourse globally. I argued that the understanding and practice of the semantic meanings associated with happiness (e.g., well-being, social and emotional learning, mental health, critical thinking, creativity) is heavily conditioned by the sociocultural, institutional, and personal contingencies and tensions spanning individual, organisational, national, and global levels. In the case of the OECD, it was primarily the organisational struggle to secure and enhance the authority in their techno-solutionist expertise in global education governance and to increase its visibility in the Post-2015 Development Agenda, i.e., the SDGs. For the two governments of Korea, the notion of 'happiness' emerged and continued to serve its role as a 'floating signifier' by providing a semantic antidote to the public frustration towards what they saw as a 'dysfunctional' socioeconomic and political system. Unlike the OECD and the Korean

polycymaking level, the vast majority of school-level actors in Korea did not convey specific economic and political visions in their articulation of ‘happiness’ and ‘Happiness Education’. Instead, the meanings of happiness they relayed derived from their respective understanding of their role in promoting happiness.

This thesis makes several contributions to the existing body of literature, advancing knowledge across both theoretical and methodological dimensions. It sheds light on a path for the field of comparative education to navigate in order to address the continuing misconceptions and confusions surrounding what ‘comparative education’ means and redefining the ways in which we can ‘compare’ education.

First, as noted in **Chapter 1**, unlike GCE and lifelong learning, there has been a serious dearth of studies that situate the OECD’s happiness and well-being initiatives within the framework of the ‘humanitarian turn’ (Li & Auld, 2020). Also, while the existing literature explored the IOs’ narrow functionalistic focus on their *seemingly* humanistic education agendas (e.g., GCE, Lifelong learning, creativity), except Elfert (2023), they did not thoroughly interrogate the juxtaposition of two ontologically distinct ‘techno-solutionist’ and ‘promissory’ narratives embedded in these agendas. By illuminating how the notions of student happiness and well-being are constructed and promoted as (i) valuable ‘competencies’ students require to be successful in the future economy and society, and (ii) the sustainable and shared ‘future we want’ (OECD, 2019b, p. 15), I argue that greater attention should be given to the ways in which the notions of ‘happiness’ and ‘Happiness Education’ signify many other major policy signifiers, e.g., the ‘future of education’, ‘21st century children’, ‘creativity’, ‘critical thinking skills’, to deconstruct what meanings, ideologies and (sociotechnical) imaginaries they embody.

This thesis, therefore, proposes the analytical framework of the ‘floating signifier’ as an effective approach for scholars to comprehend the intricacies of actor engagement in the widespread use of polysemic policy notions that lack specific meanings. While a limited number of works in the field of comparative education have referred to specific policy notions (e.g., democracy, global citizenship) as floating signifiers (see Mannion et al., 2011; Sousa & Oxley, 2021), none of them, however, have thoroughly demonstrated how these notions rely on a temporal chain of other signifiers, resulting in constant resignifications, or the intricate

network of actors involved in promoting a floating signifier. This thesis contributes novel insights to the field by highlighting the ways in which policy notions, such as happiness, effectively bring together various (and sometimes conflicting) policy discourses through their conceptual malleability.

The second contribution of this thesis lies in its problematisation of the world culture theory and its account of isomorphism. Through **Chapters 3** and **6**, I demonstrated why comparing the adoption of education policies in different countries ‘at a singular point in time after its implementation’ (Bamberger & Kim, 2022, p. 15) is problematic. Scholars such as Green et al. (1999) argued that, while the experience of facing common challenges, an increase in policy borrowing and references across nation-states, and the intensified influence of transnational and international organisations led to patchy convergence, this does not last long due to the strong social embeddedness of national education systems (see also Schriewer, 2012). Similarly, I further the argument that the dynamics between global, national, and subnational policy actors are relational, wherein nation-states continue to take active roles in constructing and delineating national visions of what the ‘talents’ in the future should look like. It is during such processes that nation-states reference, reinterpret, and (ab)use global education discourses and performance metrics to advance their national political and economic agendas (Tröhler, 2022).

This is also where I emphasise the relevance and contribution of Bartlett and Vavrus’s (2017) Comparative Case Study (CCS) approach in the field of comparative education (**Chapter 1**). The existing body of literature in the field of comparative education predominantly relies on one or several qualitative research methods and conducts descriptive cross-national or cross-school comparisons without delving deeply into the broader sociocultural and political contingencies within which each unit of analysis is situated. This thesis, therefore, seeks to address these limitations by proposing an innovative and gradually emerging methodological approach: a mixed-methods case study research that encompasses documentary evidence, questionnaires, and interviews. While a mixed-methods case study research is widely visible across various social science disciplines (Baškarada & Koronios, 2018), only a select few studies so far have adopted this approach in the field of comparative education (Naveed et al., 2017; Winthrop & Kirk, 2008). By unpacking the ‘pluri-scalar’ nature of what can be understood as a ‘happiness phenomenon’, this thesis rejects defining phenomenon as a

‘bounded’ exogenous course of events and, instead, it takes a relational approach to comparison, where research is seen as ‘an active process of criss-crossing, and [aiming] to surface the entangled complexity of sometimes disparate educational actors, devices, discourses, and practices’ (Sobe, 2018, p. 335). Both **Chapter 5** and **Chapter 6**, for example, demonstrated how global and national education policy actors are themselves transfixed with a particular ‘reading of the global’ (Cowen, 2009b). **Chapter 5** showed how the OECD’s ‘reading’ of the shifting global attention towards well-being led them to revisit and reorient their role and focus in governing education – and, more recently, the ‘future’ – in terms of that reading. **Chapter 6** demonstrated how the emergence of HEP in Korea delivers a particular ‘reading of the global’, underpinned by the desire to improve its performance in the global metrics (i.e., the OECD’s ‘Happiness Index’), to educate for global competence, and reinstate the party’s legitimacy.

These contributions instigate the discussion of ‘what’ comparative education should study and how it ought to be done (Cowen, 2014), which I believe is essentially linked to the role of ‘academic comparative education’ as a field. I argue that the first and foremost responsibility of academic comparative education is to problematise the grand policy ‘signifiers’ (e.g., knowledge economy, globalisation, the future) that tend to get employed as explanatory concepts at face value. The first imperative, therefore, is to examine why and how such signifiers and their muddled, and problematically reductive, interpretations are uncritically worshipped as a single and the most representative ‘reading of the global’ (Cowen, 2009b, p. 337) and presented as evidence of convergence whilst marginalising other many possible readings. In the recent *World Yearbook of Education 2022*, Tröhler (2022, p. 10) argued:

...there can be little talk of global isomorphism if one actually looks historically and reveals the essential differences which indicate that school systems in general and curricula in particular have been attuned to the great cultural theses of respective nation, institutionalized in the modern state and its organizations, such as schools.

Examining how such signifiers and other globally-oriented metrics and ideas are ‘reinterpreted’ and subsequently ‘(ab)used’ per the broader political and economic agendas of nation-states would be the starting point (ibid., p. 13; Maxwell et al., 2020).

8.4 Limitations and avenues for future research

Undertaking multi-level research that also attends to the issues of time and space undoubtedly has limitations in its own right. The biggest limitation of my research comes from the issues of ‘scope’, such as the exclusion of students from the unit of analysis in my study. With the outbreak of the Covid-19 pandemic six months into my PhD journey, Korea shut down schools amid the rise in cases. Even when schools were reopened from May 2020 onwards, any ‘outsiders’ were prohibited from school grounds to minimise the spread of Covid-19. Also, my position as an ‘insider-outsider’ – a Korean studying in a UK university, only partially educated under the Korean public education system up until lower secondary level, and having no experience of working and teaching in the Korean education system – greatly hindered my chances of recruiting students or having control over narrowing my recruitment focus to specific groups (e.g., public lower secondary school teachers). It should, however, also be noted that having *less* control over participant groups has in fact led to unexpected and interesting findings, where I found differences in how ‘private’ and ‘public’ school-level actors express their beliefs in their role of promoting student happiness (see **Chapter 7**), where the former expressed more critical – and beyond-curriculum – opinions and beliefs in regard to what they understand as ‘happiness’ and ‘Happiness Education’.

Many scholars noted the various gaps between the beliefs of teachers and learners and how gaps are shaped by teacher training, one’s previous teaching and learning experiences, spatial elements such as one’s place of residence, and many more (Goren, 2021; Lisennee, 2016). It will, therefore, be interesting to extend this project to examine how students understand their happiness and perceive the role of schools, teachers, and society in promoting it, which can then be compared with the beliefs of other school-level actors.

In a similar vein, another scope-related limitation of this research is the sole focus on the OECD as a global-level actor. My initial plan at the beginning of my PhD research was to examine other IOs such as the World Bank and UNESCO as well and compare their promotion of student happiness and well-being with that of the OECD. To pursue this on top of national and school-level analyses turned out to be too ambitious; hence, I chose to focus only on the OECD, which, from its first ‘joining of the club’, had a substantial influence on education policies in Korea (Joo & Halx, 2022). With growing similarities in their education policy signifiers (i.e., social and emotional skills, well-being), I believe that a horizontal

comparison especially between UNESCO and the OECD would yield interesting findings regarding their shifting role and dynamics in the face of the SDGs and the waning national interest in the ILSAs.

Also, there has been a growing presence of other global actors, most notably philanthropic organisations and multinational corporations, such as Microsoft Education and the LEGO foundation, in the OECD's promotion of student happiness and well-being. I neither delved into their partnership and funding relationship with the OECD nor examined their projects (e.g., the LEGO Foundation's *Learning through Play* project) in depth as this is beyond the remit of this research. In the near future, I aim to explore these projects and how the OECD's 'future of education' visions and STIs were shaped by these other actors.

8.5 Reflections on recent developments and Conclusion

Over the past couple of years, the making of a 'future-proof' education has been at the core of both global and national education agendas (Mertanen & Brunila, 2022). The recent literature on the future of education explored the various possibilities of changing roles of schools and teachers, new stakeholders, imaginaries of EdTech, and ways to address new forms of inequity in education (Rahm, 2023; Williamson & Komljenovic, 2022; World Economic Forum, 2017), and central to such a discussion is the importance of equipping students with new competencies (i.e., knowledge, skills, values, and attitudes) essential in the future society and economy (Rahm, 2019; Succi & Canovi, 2020).

Such efforts to make a 'future-proof' education have unfolded in various forms and initiatives in the OECD and Korea. In 2017, the PISA Governing Board agreed on the relevance of 'creative thinking' as an innovative domain to be first assessed in PISA 2021 (now delayed to PISA 2022) (for the history of OECD's measurement of creativity, see Grey & Morris, 2022; OECD, 2017b, OECD, 2019e). Praising the initiative as a 'novel assessment' (OECD, 2022, p. 3), Andreas Schleicher recently argued in the PISA 2022 Creative Thinking brochure that:

[PISA 2022 Creative Thinking] represents **a natural progression for PISA** – the global yardstick for educational success – which has **always focused on measuring young people’s ability to apply their knowledge to novel situations** (ibid., my emphasis)

Such descriptions of the OECD’s measurement of creativity as a ‘natural progression’ and PISA, in general, as a *wholehearted* assessment in which the focus has *always* been on measuring how well students ‘apply their knowledge to novel situations’ (ibid.) support my earlier argument concerning the OECD’s repositioning of its measurement schemata in the face of declining national interest in PISA and the Post-2015 education agenda. Whether the launch of the PISA 2022 Creative Thinking results in 2024 will satisfy the OECD remains unclear. As Jerrim (2023, p. 16) recently argued, while ‘the OECD tends to release results from its “innovative domains” (e.g. financial literacy, global competency) after the main study results...these do not seem to garner the same amount of attention’. Nonetheless, the ways in which the measurement of creativity and creative thinking was justified, again, involved a mixture of ‘investment’ and ‘anticipatory’ narratives, showing little difference from how the OECD utilised the two narratives to measure student well-being in PISA 2018 and other ‘soft skills’ through the SSES (see **Chapter 5**).

This development within the OECD resonates with the broader phenomenon occurring in both global and national education governance. Whitehead et al. (2017) observed that, over the past decade, *neuroliberalism* has emerged as a political project, both globally and nationally. On a global level, if in earlier days such a ‘neuroliberal’ turn was driven by economically-oriented IOs, such as the OECD and the World Bank, that engaged in brain and neuroscience research as early as the late 1990s, this turn has become evident in more recent years in IOs such as UNESCO that are traditionally associated with a strong humanistic tradition (see also Bryan, 2022; Mochizuki et al., 2022).

In Korea, following the conclusion of the presidential term of the left-wing DPK President Moon in May 2022, the newly elected right-wing People Power Party (PPP) President Yoon Suk Yeol took office (2022-present). His national vision resonated with that of the previous governments:

The goal of the state administration should be the happiness of the people ... Fairness and common sense are the fundamental requirements to making a 'happy country'. To do that, we need to change. The management of the state should be centred on the people, not the state. Macro indicators related to the national economy are important, but so are the happiness indicators, such as people's quality of life. (Yoon quoted in *The JoongAng*, 2022, n.p)

Likewise, the notion of ‘happiness’ remained a policy signifier. Just as the right-wing NFP government led by Park proposed a ‘creative economy’ and the left-wing DPK government led by Moon proposed ‘innovative growth’ as their economic slogans, Yoon’s right-wing PPP government introduced ‘the era of happiness economy’ as its national economic vision (The Government of the Republic of Korea, 2022, p. 6). Similar to Park’s promise to achieve a ‘private’ sector-led ‘creative economy’, the PPP government also argues that a ‘happiness economy’ can only be achieved when there is a virtuous cycle of growth, jobs, and welfare and when the growth is led by the ‘private’ sector (ibid.).

Interestingly, nowhere was the term ‘happiness’ mentioned in the MOE’s recent 15-page-long *Operation Plan for Key Tasks* report (MOE, 2023a). Instead, the report put a strong emphasis on the importance of cultivating ‘high-tech’ talents (i.e., digital technology, semiconductor, biohealth, environment and energy, aerospace), where the words ‘high-tech’ and ‘future’ were mentioned 18 and 10 times respectively (ibid.). Similar to the previous governments, the right-wing PPP government proposed ‘cultivating future talents through creative education’ as one of its 120 national policy tasks (The Government of the Republic of Korea, 2022, p. 135), but, again, nowhere in the MOE report defines what ‘creative education’ means.

What the government meant by ‘creative education’ can be inferred from Minister of Education Lee Ju-ho’s recent briefing session:

With the advanced digital technology, 'Education for All', the ultimate goal of education set by the United Nations in 1990, has been achieved...Since not only the application of digital technology in education, but also the changed role of teachers is important, the Ministry will thoroughly **prepare AI-driven digital textbooks and teacher training, the two key policies of the future**, and work hard to ensure that all education stakeholders can sympathize with the steps being taken for digital transformation of education, making real differences in our schools. (Lee quoted in MOE, 2023b, n.p)

As also argued in **Chapter 6**, under Park’s right-wing NFP government, the Western conceptualisations of ‘creativity’ and ‘creative economy’ were ‘transcreated’ to *changjo* (creation) instead of *chang-ui* (creative). The same issue remains in the narratives of Yoon’s right-wing PPP government, where the focus of ‘creative education’ lies on promoting ‘digital-based education innovation’ where students learn through AI-driven digital textbooks and EdTech (e.g., Virtual Reality, Artificial Reality) software. Yet again, the discussion of culture and arts is marginalised.

Such technological solutionist imaginaries of future education are concerning, particularly in the light of the implicit logic of ‘surveillance capitalism’ embodied in them (Zuboff, 2015). The notion of ‘surveillance capitalism’ which, according to Zuboff (2019), denotes a system that claims ‘human experience as free raw material for translation into behavioral data’ (p. 8) and that its aim is ‘not to impose behavioral norms, such as conformity or obedience, but rather to produce behavior that reliably, definitively, and certainly leads to desired commercial results’ (p. 198). The ways in which individuals’ happiness, well-being, creativity, and many other ‘social and emotional skills’ are illustrated and promoted in the futuristic narratives of IOs and nation-states demonstrate that their sociotechnical imaginaries of future education and economy represent a system of behavioural production; that is, every aspect of human life, including individuals’ emotions, attitudes, and behaviours, are anticipated, (re)organised, and manipulated through monetisation.

In such contexts, it would not be an exaggeration to say we are heading towards the new digital panoptic surveillance system – just like the dystopian societies Philip Dick (2013) and Aldous Huxley (1932) imagined.

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Appendices

Appendix 1. Full list of documentary data (Chapters 5 & 6)

Chapter 5

OECD Directorate(s)	Author(s)	Document type	Year	Title of publication (<i>Project</i>)
Directorate of Statistics	-	Report	2011	How's Life? Measuring well-being
Directorate of Statistics	-	Report	2013	OECD Guidelines on Measuring Subjective Well-being.
Directorate for Education and Skills	-	Report	2013	PISA 2012 Results: Ready to Learn: Students' Engagement, Drive and Self-Beliefs (Volume III)
Directorate for Education and Skills	-	Questionnaire	2014	Student Questionnaire for PISA 2015
Directorate for Education and Skills	-	Report	2014	PISA 2012 Results in Focus: What 15-year-olds know and what they can do with what they know
Directorate for Education and Skills	-	Education policy-oriented notes (public- / user-friendly, as described by the OECD)	2015	Do teacher-student relations affect students' well-being at school? [PISA in Focus No. 50]
Directorate for Education and Skills	Schleicher, A.	Proposal report presented at the PISA Governing Board meeting	2015	Proposals for PISA 2018 international questionnaire options: 39 th meeting of the PISA Governing Board
Development Co-operation Directorate	-	Action Plan	2016	Better Policies for 2030: An OECD Action Plan on the Sustainable Development Goals

Directorate for Education and Skills	-	Working paper	2016	A framework for the analysis of student well-being in the PISA 2015 study: Being 15 in 2015
Directorate for Education and Skills	Taguma, M., & Rychen, D.S.	Background paper	2016	E2030 Conceptual Framework: Key Competencies for 2030 (DeSeCo 2.0) [OECD Learning Compass 2030]
Directorate for Education and Skills	Taguma, M., Shirai, S., & Anger, K.	Preliminary report	2016	Preliminary Reflections and Research on Knowledge, Skills, Attitudes and Values Necessary for 2030 [OECD Learning Compass 2030]
Directorate for Education and Skills	Taguma, M., Rychen, D.S., & Lippman, L.	Discussion paper	2016	Education 2030: Draft Discussion Paper on the Progress of the OECD Learning Framework 2030 [OECD Learning Compass 2030]
Directorate for Education and Skills	Taguma, M., & Anger, K.	Discussion paper	2016	The Education 2030 Conceptual Learning Framework as a Tool to Build Common Understanding of Complex Concepts: 4 th Informal Working Group on the Future of Education and Skills: OECD Education 2030 [OECD Learning Compass 2030]
Directorate for Education and Skills	-	Report	2017	PISA 2015 Results (Volume III): Students' Well-Being
Directorate for Education and Skills	-	Education policy-oriented notes	2017	Are students happy? PISA 2015 Results: Students' Well-Being [PISA in Focus No. 71]
Directorate for Education and Skills	Taguma, M.	Discussion paper	2017	Future of Education and Skills 2030: Reflections on Transformative Competencies 2030 [OECD Learning Compass 2030]

Directorate for Education and Skills	Taguma, M., & Hannon, V.	Progress report	2017	EDPC Education and Skills 2030: Conceptual Learning Framework [OECD Learning Compass 2030]
Directorate for Education and Skills	Taguma, M., Barteit, L., & Lim, M.H.	Background paper	2017	Education 2030 – Conceptual learning framework: Background papers: 6 th Informal Working Group (IWG) meeting [OECD Learning Compass 2030]
Directorate for Education and Skills	-	Education policy-oriented notes	2017	Is too much testing bad for student performance and well-being? [PISA in Focus No. 79]
Directorate for Education and Skills	Choi, A.	Working paper	2018	Emotional Well-being of Children and Adolescents: Recent Trends and Relevant Factors [OECD Education Working Paper No. 169]
Directorate for Education and Skills	-	Report	2018	Preparing our youth for an inclusive and sustainable world: The OECD PISA global competence framework
Directorate for Education and Skills	-	Position Paper	2018	The Future of Education and Skills: Education 2030 [OECD Learning Compass 2030]
Directorate for Education and Skills	Taguma, M., Barteit, L., Feron, E., & Lim, M.H.	Discussion paper	2018	Education and Skills 2030: Conceptual Learning Framework; Draft Papers supporting the OECD Learning Framework 2030; 7 th Informal Working Group (IWG) Meeting [OECD Learning Compass 2030]
Directorate for Education and Skills	Chernyshenkoi, O.S., Kankarašii, M., & Drasgow, F.	Working Paper	2018	Social and emotional skills for student success and wellbeing: Conceptual framework for the OECD study on social and emotional skills

Directorate for Education and Skills	-	Report	2019	PISA 2018 Assessment and Analytical Framework
Directorate for Education and Skills	-	Report	2019	OECD Future of Education and Skills 2030: OECD Learning Compass 2030 – A Series of Concept Notes
Directorate for Education and Skills	-	Report	2019	PISA 2018 Results (Volume III): What School Life Means for Students' Lives
Directorate for Education and Skills	-	Report	2019	Social and Emotional Skills: Well-being, connectedness and success
Directorate for Education and Skills	Kankaraš, M. & Suarez-Alvarez, J.	Working paper	2019	Assessment framework of the OECD Study on Social and Emotional Skills
Directorate for Education and Skills	-	Report	2020	PISA 2018 Results (Volume VI): Are Students Ready to Thrive in an Interconnected - World?
Directorate for Education and Skills	-	Video Transcript	2021	OECD International launch of the first results from the Survey on Social and Emotional Skills
Directorate for Education and Skills	Schleicher, A.	Blog	2021	A new approach to look beyond academic learning
Directorate for Education and Skills	-	Report	2021	OECD Survey on Social and Emotional Skills: Technical Report
Directorate for Education and Skills	-	Report	2021	Beyond Academic Learning: First Results from the Survey of Social and Emotional Skills
Directorate for Education and Skills	Feldmárová, I.	Blog	2021	Social and emotional skills: Global importance, local responsibility?

Chapter 6

Publisher(s)	Author(s)	Document type	Date(s)	Document Title
<i>The JoongAng</i>	-	Transcript (presidential speech)	2012	<i>Full text of Park Geun-hye's declaration of candidacy... "Promoting Fifty Million People's Happiness Plan"</i> (Published in Korean)
The Government of the Republic of Korea	-	Press release / Transcript (presidential speech)	2013	<i>[Full text] Park Geun-hye President's Inaugural Speech</i> (Published in Korean)
The Government of the Republic of Korea	-	Policy plan	2013	<i>Park Geun-hye government's 140 Policy Tasks</i> (Published in Korean)
Ministry of Science, ICT and Future Planning	-	Policy plan	2013	<i>Park Geun-hye government's Creative Economy Blueprint: 「Creative Economy Realisation Plan – Planning for Creative Economy Ecosystem」</i> (Published in Korean)
Ministry of Education	-	Policy plan	2013	<i>Operation plan for 2013 Policy Tasks: Happiness education and cultivation of creative talents</i> (Published in Korean)
Ministry of Education	-	Policy plan	2013	<i>Happiness Education: Opening up a new era of hope through happiness education and by cultivating creative talent</i> (Published in Korean)

Ministry of Education	-	Policy Plan	2013	<i>Announcement of a plan to strengthen general high school education capabilities to realise Happiness Education that fosters dreams and talents (Published in Korean)</i>
Ministry of Education	-	Policy Plan	2013	<i>The basic plan for Free Semester Initiative in secondary schools (Published in Korean)</i>
Korea Institute for Curriculum and Evaluation	Kim, J., Kim, T., Lee, Y., & Seo, Y.	Research report	2013	<i>The way of creating a happy school that cultivates dreams and talents (Published in Korean)</i>
Ministry of Education	-	Policy plan	2013 2014 2015 2016	<i>Major Policies and Plans (Published in English)</i>
KEDI	Shin, C.	Research report	2014	<i>Settlement measures for middle school free-semester program in Korea (Published in Korean)</i>
Korea Herald	Yoon, M.	Transcript (presidential speech)	2014	<i>President stresses new education model to nurture creativity (Published in English)</i>
Ministry of Education	-	Work report	2014	<i>Creative talent opens up a happy educational future for everyone (Published in Korean)</i>
Ministry of Education	-	Policy plan	2015	<i>Operation Plan for Free Semester Initiative at Lower Secondary Schools: Nurturing students' dreams and talents and realising Happiness Education (Published in Korean)</i>
The Government of the Republic of Korea	-	Policy brief / Transcript (presidential speech)	2016	<i>President Park says, "Creative economy is the only growth engine for economic leap forward (Published in Korean)</i>

Ministry of Education, Ministry of Employment and Labour, Ministry of Health and Welfare, Ministry of Gender Equality and Family	-	Policy plan	2016	<i>2016 Work Plan for Happiness of the People</i> (Published in Korean)
Ministry of Education	-	Policy plan	2017	<i>2017 Work Plan: Happiness education where everyone grows, Creative talent who leads the future</i> (Published in Korean)
Ministry of Education	-	Policy plan	2017	<i>A plan to expand and develop the Free Semester Initiative at lower secondary schools</i> (Published in Korean)
Ministry of Education	-	Press release	2017	<i>People-centred creative · convergence education: Supporting the growth of talents</i> (Published in Korean)
National Planning Committee	-	Policy plan	2017	<i>Moon Jae-in government's five-year governmental operational plan</i> (Published in Korean)
Ministry of Education	-	Press release	2017	<i>People-centred creativity convergence education...The government supports the growth of human talent</i> (Published in Korean)
Korea Educational Development Institute	Hong, Y.	Research report	2018	<i>An analysis on the current state of innovation education districts in Korea</i> (Published in Korean)
Ministry of Education & Korea Institute for Curriculum	-	Leaflet	2018	<i>Student-centred Happiness Education in which one can choose his or her favourite subject: High</i>

and Evaluation				<i>School Credit System</i> (Published in Korean)
The Government of the Republic of Korea	-	Policy brief	2019	<i>What is a High School Credit System</i> (Published in Korean)
Ministry of Culture, Sports and Tourism	-	Press release	2019	<i>To prevent discrimination from the birth ...The state takes the responsibility of childcare and education</i> (Published in Korean)
Ministry of Education	-	Press release	2020	<i>The Ministry of Education will further strengthen the state responsibility to guarantee basic academic achievement</i> (Published in Korean)
Ministry of Education	-	Report	2020	<i>2020 Education in Korea</i> (Published in English)
The Government of the Republic of Korea	-	Report	2020	<i>Moon Jae-in government's 100 Policy Tasks</i> (Published in Korean)
Office of the President	-	Transcript (presidential speech)	2020	<i>Address by President Moon Jae-in on Korea's 75th Liberation Day</i> (Published in English)
Ministry of Education	-	Policy Plan	2021	<i>Comprehensive Plan for Promotion of High School Credit System</i> (Published in Korean)
Ministry of Education	-	Report	2021	<i>Innovation Plan for Human Resource Development Policy</i> (Published in Korean)
Ministry of Education	-	Report	2021	<i>Moon Jae-in government: The fourth year evaluation of the progress of the 100 Policy tasks</i> (Published in Korean)
Presidential Committee on the Fourth	-	Press release	2022	<i>The 28th Meeting of the Presidential Committee on The Fourth Industrial</i>

Industrial Revolution				<i>Revolution</i> (Published in Korean)
Ministry of Education	-	Report	2022	<i>Five-year (2017-2022) Achievement in education section</i> (Published in Korean)
Ministry of Education & Korea Institute for Curriculum and Evaluation	-	Research report	2022	<i>A guide for introducing and operating High School Credit System</i> (Published in Korean)

Appendix 2. Online questionnaire: Information sheet and consent form

교육의 목표 및 행복에 대한 학교 현장 관계자의 이해: 연구설명서

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지도교수: Professor Paul Morris (paul.morris@ucl.ac.uk) & Professor Terri Kim (terri.kim@ucl.ac.uk)

본 설문은 영국 University College London의 Institute of Education에서 박사 과정을 밟고 있는 김민지 박사후보생의 논문 연구를 위해 수행됩니다.

본 연구의 목적은 '행복'이라는 개념이 교육 현장에서 어떻게 이해되고 적용되는지 파악하는 것이며, 특히 1) 학교 현장과 직·간접적으로 소통하는 교육전문가 (장학사, 장학관 교육연구사 등) 및 교사교육자 (교원연수자, 교수 등), 그리고 2) 현장에서 행복교육을 직접 운영하는 학교 관계자(교사, 교감, 교장 등)의 행복에 대한 이해와 주도성이 성공적인 교육 운영에 가장 중요한 요소라 간주되어 본 연구를 진행하게 되었습니다.

해당 설문은 교육전문가, 학교관리자, 교사, 그리고 교사교육자 등을 대상으로 진행되며, 약 15분 정도 소요될 예정입니다.

본 설문에서 수집된 모든 답변과 정보는 엄격하게 비밀로 유지되며 모든 답변과 개인 정보는 기밀로 처리됩니다. 수집된 모든 데이터와 결과는 이 연구의 목적으로만 사용되며 담당 연구자만 정보에 접근할 수 있습니다. 제공해주신 개인정보는 보안에 유의해 최소 5년 간 보관되고 그 이후에는 영구 삭제될 예정입니다. 또한 본 연구가 추후 학회 발표 및 학술지에 게재될 경우에도 응답자 분들의 개인 정보는 사용되지 않을 것입니다.

본 설문에의 참여는 자율 선택사항이며, 연구 발표 이전에 원하실 경우 언제든지 답변을 철회하실 수 있습니다. (예상 발표시기: 2022년 하반기)

본 연구에 관한 질문이나 우려가 있을 시 evelyn.kim.15@ucl.ac.uk 로 이메일을 보내주시면 담당 연구자가 자세히 설명해 드릴 것입니다.

선생님의 적극적인 참여에 진심으로 감사드립니다.

연구 참여 동의서

교육의 목표 및 행복에 대한 학교 현장 관계자의 이해: 연구 참여 동의서

조사에 응하기 전에 이 양식을 주의 깊게 읽어주십시오.

- 귀하는 본 연구 관련 설명문을 읽었으며 이에 대해 충분히 생각하였습니다.
- 귀하는 본 연구에 참여하는 것에 대하여 자발적으로 동의합니다.
- 귀하는 본 연구에 참여하는데 있어서 직접적이거나 금전적인 보상이 없다는 점을 인지합니다.
- 귀하는 본 연구의 참여를 철회할 수 있고 이러한 결정이 귀하에게 어떠한 해도 되지 않을 것임을 확인하였습니다.
- 귀하가 본 연구에서 겪은 불편함 또는 문제점을 제기하려면 누구에게 연락 해야 하는지 인지하였습니다.
- 귀하의 이름, 성별, 연령대, 소속청, 교직경력, 근무학교급, 직급, 담당교과 등이 수집되는 것을 인지하며, 연구에 사용되는 것을 허락합니다.
- 귀하는 상기 나열된 정보들을 국내 현행 법률과 영국 개인정보 보호법 규정이 허용하는 범위 내에서 연구자가 수집하고 처리하는데 동의합니다.
- 귀하가 제공하신 모든 자료들은 최소 5년 간 보관될 것이며, 이후에는 영구적으로 삭제될 것을 확인하였습니다.
- 귀하가 제공하신 모든 자료들이 귀하의 동의 없이는 제 3자와 공유되지 않을 것을 인지합니다.

위 항목에 동의하신다면 다음으로 넘어가 설문을 완성하여 주십시오.

Appendix 3. Online questionnaire (in Korean)

1. 이름 *

2. 성별 *

Mark only one oval.

남

여

3. 연령대 *

Mark only one oval.

20-29세

30-39세

40-49세

50-59세

60세 이상

4. 현재 학교에서 재직 중이십니까? *

아래 보기에 해당 사항이 없다면 Other에 기입해주시기 바랍니다. (예시: Other - 교외기관 교사교육자, 교수, 장학관 등)

Mark only one oval.

재직

휴직

퇴직

Other: _____

5. 소속 교육청 *

* 교사교육자 분들은 소속된 기관을 기준으로 기입해주시기 바랍니다.

Mark only one oval.

- 서울
- 부산
- 대구
- 인천
- 광주
- 대전
- 울산
- 세종
- 경기도
- 강원도
- 충청북도
- 충청남도
- 전라북도
- 전라남도
- 경상북도
- 경상남도
- 제주도
- Other: _____

6. 귀하의 (전·현직) 직업 및 직급은 무엇입니까? *

해당 설문은 학교관리자(교장/교감), 담당 교사, 교육전문가, 그리고 교사교육자 등을 대상으로 실시되고 있습니다. 아래 보기에 해당 사항이 없다면 Other에 기입해주시기 바랍니다.

Mark only one oval.

- 교장
- 교감
- 교사
- 교사교육자 (교외 기관 - 교수, 교원연수자 등) Skip to question 17
- 교육전문직 (장학사, 장학관, 교육연구사 등)
- Other: _____

7. 교직경력

*해당이 없다면 다음 질문으로 넘어가주세요.

Mark only one oval.

- 1년 미만
- 1년 이상 5년 미만
- 5년 이상 10년 미만
- 10년 이상 20년 미만
- 20년 이상

8. 이전에 '행복교육' 주제와 관련된 연수를 받거나 진행한 경험이 있으십니까? *

(예시: 놀이를 통한 행복한 유아교육, 행복교실의 첫 걸음 '학생정신건강의 이해', 예술로 행복한 수업 만들기, 행복교실 만들기 등등)

Mark only one oval.

- 예
- 아니오

9. 연수에 대한 질문

위 질문에 '예'로 응답 하셨다면, 선생님께서 이수하신 (혹은 진행하신) 연수 제목, 내용, 연수 대상 등을 간략히 소개해주세요.

학교에 대한 질문

현재 (혹은 퇴직하셨다면 이전에) 근무하시는 학교에 대한 질문입니다.

10. [근무기간] 현재 재직 · 휴직 중인 학교에서 얼마나 근무하셨습니다습니까? *

* 퇴직하셨다면 가장 최근에 근무하신 학교를 기준으로 기입해주세요.

Mark only one oval.

- 1년 미만
- 1년 이상 5년 미만
- 5년 이상 10년 미만
- 10년 이상

11. 학교 구분 *

* 퇴직하셨다면 가장 최근에 근무하신 학교를 기준으로 기입해주세요. 또한, 아래 보기에 해당 사항이 없다면 Other에 기입해주시기 바랍니다. 기타학교에서 'Other'에 해당되는 응답을 적어주시기 바랍니다.

Mark only one oval.

- 유치원
- 초등학교
- 중학교
- 고등학교
- Other: _____

12. 학교 유형 (1) 유치원

<유치원>에서 근무하시거나 근무하셨던 이력이 있다면 응답하여 주시기 바랍니다. ***해당되는 사항에 모두 표기하여 주십시오 (예시: 국립 혁신유치원 근무시 '국립 유치원' 및 '혁신유치원'란 모두에 표기해 주십시오). 유치원에서 근무한 이력이 없으시다면 다음 질문으로 넘어가주세요.

Check all that apply.

- 국립 유치원
- 공립 유치원
- 사립 유치원
- 혁신 유치원
- Other: _____

13. 학교 유형 (1) 초등학교

<초등학교>에서 근무하시거나 근무하셨던 이력이 있다면 응답하여 주시기 바랍니다. ***해당되는 사항에 모두 표기하여 주십시오 (예시: 국립 혁신초등학교에 근무시 '국립 초등학교' 및 '혁신학교/행복학교'란 모두에 표기해 주십시오). 초등학교에서 근무한 이력이 없으시다면 다음 질문으로 넘어가주세요.

Check all that apply.

- 국립 초등학교
- 공립 초등학교
- 사립 초등학교
- 혁신학교 · 행복학교
- Other: _____

14. 학교 유형 (2) 중학교

<중학교>에서 근무하시거나 근무하셨던 이력이 있다면 응답하여 주시기 바랍니다. ***해당되는 사항에 모두 표기하여 주십시오 (예시: 공립 혁신중학교에 근무시 '공립 중학교' 및 '혁신학교/행복학교' 란 모두에 표기해 주십시오). 중학교에서 근무한 이력이 없으시다면 다음 질문으로 넘어가주세요.

Check all that apply.

- 국립 중학교
- 공립 중학교
- 사립 중학교
- 혁신학교 · 행복학교
- Other: _____

15. 학교 유형 (3) 고등학교

<고등학교>에서 근무하시거나 근무하셨던 이력이 있다면 응답하여 주시기 바랍니다. ***해당되는 사항에 모두 표기하여 주십시오 (예시: 공립 혁신고등학교에 근무시 '공립 고등학교' 및 '혁신학교/행복학교' 란 모두에 표기해 주십시오). 고등학교에서 근무한 이력이 없으시다면 다음 질문으로 넘어가주세요.

Check all that apply.

- 국립 고등학교
- 공립 고등학교
- 사립 고등학교
- 혁신학교 · 행복학교
- Other: _____

16. 담당 교과목

초·중·고등학교 교사분들 대상 질문입니다. 중복응답 가능합니다.

Check all that apply.

- 초등학교 담임
- 국어
- 영어
- 제 2 외국어
- 수학
- 과학 (과학 계열)
- 사회·국사 (사회 계열)
- 기술·가정
- 한문
- 도덕
- 진로
- 체육
- 미술
- 실과, 동아리 등
- Other: _____

귀하는 교육의 목표에 대해 어떻게 인식하고 계십니까?

아래 보시게 될 문항들은 각기 다른 교육의 "목표"를 서술합니다.

이 문항들은 특정 연령 또는 단계의 교육 목표가 아닌, "정규 교육의 궁극적인 목표"에 대한 귀하의 의견을 묻는 내용입니다.

각 문항을 읽으신 후, 해당 문항이 교육의 목표로서 얼마만큼의 중요도를 지니는지 평가하여 주시기 바랍니다.

**

0 = 이는 절대 교육의 목표가 되어서는 안된다.

1 = 이는 교육의 목표가 될만큼 중요하지 않다.

2 = 이는 교육의 목표로서 적은 중요도를 지닌다.

3 = 이는 교육의 목표로서 보통의 중요도를 지닌다.

4 = 이는 교육이 지녀야 할 중요한 목표이다.

5 = 이는 교육의 궁극적인 목표이다.

각 문항이 중요도에 따라 0점에서 5점 사이의 점수를 산정하여 주시기 바랍니다.

17. 교육의 목표는 핵심 과목의 지식을 두루 획득하고 실생활에서 활용할 수 있는 학생을 양성하는 것이다. (예시: 과학, 수학, 사회, 한국사 등) *

Mark only one oval.

0 1 2 3 4 5

18. 교육의 목표는 자신이 살아가는 지역 환경에 대한 역사적, 지리적, 자연적, 그리고 사회적 지식을 지닌 학생을 양성하는 것이다. *

Mark only one oval.

0 1 2 3 4 5

19. 교육의 목표는 자신이 경험해보지 못한 시대, 장소, 문화 등에 대한 지식도 폭넓게 갖춘 학생을 양성하는 것이다. *

Mark only one oval.

0 1 2 3 4 5

20. 교육의 목표는 자신이 전달하고자 하는 바를 목적에 맞게 명확하고 정확히 말하고 쓸 줄 아는 학생을 양성하는 것이다. *

Mark only one oval.

0 1 2 3 4 5

21. 교육의 목표는 질문과 실험 탐구 등을 통해 직접적으로 지식 및 정보를 얻을 줄 아는 학생을 양성하는 것이다. *

Mark only one oval.

0 1 2 3 4 5

22. 교육의 목표는 수집한 정보를 분석하고 평가해 합리적인 판단과 선택을 할 수 있는 능력을 지닌 학생을 양성하는 것이다. *

Mark only one oval.

0 1 2 3 4 5

23. 교육의 목표는 학생들이 건강을 유지해 나가는 데 필요한 지식을 지니고 건강한 생활습관을 기를 수 있도록 장려하는 것이다. *

Mark only one oval.

0 1 2 3 4 5

24. 교육의 목표는 학생들이 정확한 성 지식과 올바른 성 가치관에 기초해 책임감 있는 행동을 할 수 있도록 하는 것이다. *

Mark only one oval.

0 1 2 3 4 5

25. 교육의 목표는 학생들이 위급한 상황에서도 스스로 안전하게 대처할 수 있도록 가르치는 것이다. *

Mark only one oval.

0 1 2 3 4 5

26. 교육의 목표는 학생들이 예술과 공예와 관련해 적절한 기술을 습득하도록 하는 것이다. (예시: 1개 이상의 악기 연주, 서예 등) *

Mark only one oval.

0 1 2 3 4 5

27. 교육의 목표는 학생들이 그림, 음악, 연극, 춤 등 다양한 예술 형태를 통해 자신의 감정을 표현하고 전달할 수 있도록 하는 것이다. *

Mark only one oval.

0 1 2 3 4 5

28. 교육의 목표는 학생들이 예술적 경험을 통해 이해하고 느낀 바에 대해 타인과 대화할 줄 알게 하는 것이다. (예시: 미술작품 및 조각상 관람, 시 낭송 등)

Mark only one oval.

0	1	2	3	4	5
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

29. 교육의 목표는 학생들이 자신의 감정을 잘 인지할 수 있도록 가르치는 것이다. *

Mark only one oval.

0	1	2	3	4	5
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

30. 교육의 목표는 학생들이 자신이 인생의 주체임을 알고, 본인의 강점과 단점을 인지하며, 스스로 목표를 설정하고 조정할 수 있도록 돕는 것이다.

Mark only one oval.

0	1	2	3	4	5
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

31. 교육의 목표는 학생들이 상황에 따라 자신의 행동과 감정을 조절할 수 있도록 하는 것이다. *

Mark only one oval.

0	1	2	3	4	5
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

32. 교육의 목표는 학생이 스스로 성장할 수 있는 역량을 갖출 수 있도록 해주는 것이다 *

Mark only one oval.

0	1	2	3	4	5
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

33. 교육의 목표는 학생들이 자신의 생각이 보편성을 벗어날지라도 신념에 따라 행동할 수 있도록 장려하는 것이다. *

Mark only one oval.

0	1	2	3	4	5
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

34. 교육의 목표는 행복하고, 즐거우며, 균형이 잘 잡힌 학생을 만드는 것이다. *

Mark only one oval.

0	1	2	3	4	5
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

35. 교육의 목표는 모든 활동에 열정을 가지고 최선을 다하는 학생을 만드는 것이다. *

Mark only one oval.

0	1	2	3	4	5
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

36. 교육의 목표는 학생들이 학업에 즐거움을 느끼고 자신의 성취에 만족감을 갖도록 하는 것이다. *

Mark only one oval.

0	1	2	3	4	5
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

37. 교육의 목표는 학생들이 특정 분야에서 자신만의 창의성과 독창성을 보여줄 수 있도록 하는 것이다. (예시: 그림, 음악, 기계, 안무, 시 등) *

Mark only one oval.

0	1	2	3	4	5
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

38. 교육의 목표는 학생들이 변화하는 환경에 적응하고 유연한 관점을 갖도록 하는 것이다. *

Mark only one oval.

0	1	2	3	4	5
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

39. 교육의 목표는 학생들이 자신이 살아가는 환경에 대한 탐구 자세를 지닐 수 있도록 하는 것이다. *

Mark only one oval.

0	1	2	3	4	5
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

40. 교육의 목표는 학생들이 쉽게 사회적 관계를 형성하고 타인과 함께 살아가는 일상에 익숙해 질 수 있도록 돕는 것이다. *

Mark only one oval.

0 1 2 3 4 5

41. 교육의 목표는 학생들이 토론에 적극적으로 참여하고 타인의 의견을 경청할 수 있도록 하는 것이다. *

Mark only one oval.

0 1 2 3 4 5

42. 교육의 목표는 학생들이 타인에게 베푸는 태도를 갖게끔 하는 것이다. *

Mark only one oval.

0 1 2 3 4 5

43. 교육의 목표는 학생들에게 공동체 의식을 길러주는 것이다. 예를 들어, 자신이 속한 학급, 학교, 그리고 사회의 일원으로서 맡은 바에 책임감을 보이고 최선을 다할 줄 알아야 한다. *

Mark only one oval.

0 1 2 3 4 5

44. 교육의 목표는 책임감, 정직함, 성실함 등 학생들의 행동에 중요한 근간이 될 도덕적 가치를 가르치는 것이다. *

Mark only one oval.

0 1 2 3 4 5

45. 교육의 목표는 인공지능과 빅데이터 등 4차 산업시대 현대 과학기술에 대해 어느정도 지식을 갖춘 학생을 양성하는 것이다. *

Mark only one oval.

0 1 2 3 4 5

46. 교육의 목표는 대중매체와 같이 일상에서 접하게 되는 콘텐츠를 선별적, 비판적 태도로 수용할 줄 아는 학생을 기르는 것이다. *

Mark only one oval.

0 1 2 3 4 5

47. 교육의 목표는 학생들이 디지털을 활용하고 스스로 정보 및 콘텐츠를 생산하고 공유하는 능력을 갖추도록 하는 것이다. *

Mark only one oval.

0 1 2 3 4 5

48. 교육의 목표는 학생들이 디지털을 활용해 보다 넓은 세상의 일원이 될 수 있는 발판을 마련해주는 것이다. *

Mark only one oval.

0 1 2 3 4 5

49. 교육의 목표는 창의·융합적 사고 역량을 지닌 인재를 양성하는 것이다. *

Mark only one oval.

0	1	2	3	4	5
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

50. 교육의 목표는 학생들이 자신이 세계의 일원임을 인지하고 세계 시민으로서의 역할과 책임을 다할 수 있도록 가르치는 것이다. *

Mark only one oval.

0	1	2	3	4	5
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

51. 교육의 목표는 학생들이 개인 뿐만 아니라 공동체, 지구의 복지에 기반한 미래를 만들어갈 수 있도록 성장시키는 것이다. *

Mark only one oval.

0	1	2	3	4	5
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

52. 교육의 목표는 학생들이 지속가능한 발전의 중요성을 이해하고 실천하는 법을 가르치는 것이다. *

Mark only one oval.

0	1	2	3	4	5
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

53. 교육의 목표는 학생들에게 직업시장에서 요구하는 핵심 역량을 가르치고 신장시키는 것이다. *

Mark only one oval.

0 1 2 3 4 5

54. 교육의 목표는 학생들이 빠르게 변화하는 산업수요 및 직업세계를 이해하고 이를 바탕으로 자신의 진로 목표를 세울 수 있도록 돕는 것이다. *

Mark only one oval.

0 1 2 3 4 5

55. 교육의 목표는 학생들이 자신의 삶의 의미와 목적을 찾을 수 있도록 돕는 것이다. *

Mark only one oval.

0 1 2 3 4 5

56. 교육의 목표는 학생들에게 행복의 의미와 행복한 삶에 필요한 자세를 가르치는 것이다. *

Mark only one oval.

0 1 2 3 4 5

57. 상기 문항들에 언급되지 않았지만 귀하가 생각하시는 '교육의 목표'가 있다면 아래에 자유롭게 서술해주시시오.

행복 및 웰빙에 대한 학교 구성원 및 교사교육자의 이해

각 문항을 읽으신 후, 귀하께서는 해당 문항에 얼마나 동의하시는 지 평가하여 주시기 바랍니다.

1 = 매우 그렇지 않다.

2 = 그렇지 않다.

3 = 보통이다.

4 = 그렇다.

5 = 매우 그렇다.

58. 교사의 직무 스트레스는 학생의 심리적 안녕감에 영향을 미친다. *

Mark only one oval.

1 2 3 4 5

매우 매우 그렇다.

59. 학생 개인의 특기와 적성을 발견하고 격려해주는 것은 담임 교사의 역할이다. *

Mark only one oval.

1 2 3 4 5

매우 매우 그렇다.

60. 학생의 심리적, 사회적 안정을 위해서 학교 관리자와 교사들은 주기적으로 회의를 할 필요가 있다. *

Mark only one oval.

1 2 3 4 5

매우 매우 그렇다.

61. 학생의 심리적, 사회적 안녕감을 위해서 교사들은 학부모들과 주기적으로 상담을 할 필요가 있다. *

Mark only one oval.

1 2 3 4 5

매우 매우 그렇다.

62. 학교는 학생들에게 행복이 무엇인지 지식을 전달해야 할 의무가 있다. *

Mark only one oval.

1 2 3 4 5

매우 매우 그렇다.

63. 학생의 행복 및 웰빙은 학업 성취에 직접적인 영향을 미친다. *

Mark only one oval.

1 2 3 4 5
매우 매우 그렇다.

64. 학교는 학생들에게 행복한 삶을 추구하는데 필요한 태도와 가치관을 정립해주어야 한다. *

Mark only one oval.

1 2 3 4 5
매우 매우 그렇다.

65. 학교의 역할은 배움이 즐거운 환경을 제공하는 것이다. *

Mark only one oval.

1 2 3 4 5
매우 매우 그렇다.

66. 학교의 역할은 학생들이 사회에 나가서 경쟁력있고 성공적인 삶을 살 수 있게 하는 것이다. *

Mark only one oval.

1 2 3 4 5
매우 매우 그렇다.

67. 학교에서 행복한 아이들이 사회에 나가서도 행복하다. *

Mark only one oval.

1 2 3 4 5
매우 매우 그렇다.

68. 학교 관리자 및 교사들은 학생 개개인의 지적, 심리적, 사회적, 신체적 상태를 지속적으로 관찰해야할 의무가 있다. *

Mark only one oval.

1 2 3 4 5

매우 매우 그렇다.

69. 학창시절에 심리적, 사회적 안정감이 높은 학생들이 이후 사회 및 경제적으로 성공할 확률이 더 높다. *

Mark only one oval.

1 2 3 4 5

매우 매우 그렇다.

70. 학생의 수업 참여도는 학생의 심리적, 사회적 안정감에 높은 영향을 준다. *

Mark only one oval.

1 2 3 4 5

매우 매우 그렇다.

71. '학생의 행복'이 교육의 목표라면 귀하의 역할은 무엇이라고 생각하십니까? *

72. 위에 서술해주신 역할 수행에 제약조건이 있다면 무엇입니까? *

교육의 사회적 · 개인적 목적

아래 두 문항은 교육의 목적을 각각 사회적 및 개인적 관점에서 서술합니다. 다음 두 문항에 대해 선생님께서 중요도에 따라 0점 (전혀 아니다)에서 5점 (매우 그렇다)까지 점수를 매겨주십시오.

73. 1. 교육의 목적은 학생들이 사회구성원으로서 공동체생활을 조화롭고 유능하게 영위하는 데 필요한 기술, 지식 및 태도 등 다양한 자질들을 형성하는 것이다. *

Mark only one oval.

0 1 2 3 4 5
전혀 매우 그렇다.

74. 2. 교육의 목적은 학생들이 자신의 재능과 흥미를 발견함으로써 독립성과 개성을 발현하고, 이를 바탕으로 삶의 즐거움을 찾고 사회에 대한 자신만의 시각을 갖도록 해주는 것이다. *

Mark only one oval.

0 1 2 3 4 5
전혀 매우 그렇다.

설문완료 (추가 면담 여부, 선택가능)

제공해주신 응답들과 관련해 1:1 면담을 통해 선생님의 더 구체적인 의견 및 경험을 듣고 싶습니다. 면담은 편하신 날짜 및 시간에 온라인 (zoom)으로 진행될 예정이며, 예상 소요 시간은 약 30분입니다. 참여해주실 의사가 있으시다면 아래에 연락처를 (휴대폰 번호 및 이메일 주소) 남겨주시면 빠른 시일 안에 연락드리겠습니다. 많은 참여 부탁드립니다!

75. 연락처 (휴대폰)

76. 연락처 (이메일)

Appendix 4. Sample interview schedule (policy intermediary)

1. Tell me about yourself, your professional experience, and an education issue you are most interested in.
2. How did you first become interested in the topic of happiness/Happiness Education?
3. Can you tell me about the happiness/Happiness Education project you have been involved in? (if the interviewee works for an institution or in a project that promotes a *specific* vision and practice of Happiness Education)
 - a. How was this project first introduced? Any consensus or disagreement? (in conceptual terms, objectives, etc.)
 - b. Was there any benchmarking involved? Any reference to foreign models or practices? (if **yes**, why were they selected? Any specific elements referenced or borrowed?)
4. How did the MOE/local office of education respond to the project?
5. Personally, what does the term ‘happiness’ mean to you?
 - a. What values, attitudes, and dispositions would you associate with ‘happiness’?
6. How about ‘Happiness Education’? What do you think its goals should be?
 - a. Can you think of any barriers and challenges your vision of Happiness Education could face if it were to be implemented as a formal programme?
7. What are your thoughts about the Happiness Education Policy (HEP) implemented by the Park Geun-hye government? (check if they were involved in the policymaking)
 - a. Any similarities and differences with your– or your institution’s –understanding of happiness and Happiness Education?
 - b. Have you noticed any changes among teachers? (if the interviewee is a teacher educator)
8. How are Park’s HEP visions discussed under the Moon Jae-in government?

Appendix 5. Sample interview schedule (school-level actor)

1. Tell me about yourself, your background, the grade and subject you are teaching, and any other responsibilities you may have
2. Why did you become a teacher/education professional/school leader?
3. Tell me about your school (e.g., the overall socioeconomic composition of the school, regional characteristics, class size, parental involvement in education)
4. What does the term ‘happiness’ mean to you?
 - a. What values, attitudes, and dispositions would you associate with ‘happiness’?
5. How about ‘Happiness Education’?
6. Have you heard these terms before? If so, where?
7. What do you think should be the primary aim of ‘Happiness Education’?
8. Have you come across similar programmes/practices/activities in the school you are working in?
 - a. If **yes**, can you tell me more about the programme/practice/activity?
 - b. If **not**, what would be the reasons?
9. What do you think should be your role in promoting student happiness?
 - a. Do you have any know-how?
 - b. Have you experienced any difficulties in promoting the role? How did you address these difficulties?
10. If you are given an opportunity to design a programme that promotes student happiness with sufficient support and resources, what would that be?

Appendix 6. Vignette of translated and transcribed interview

Sunny (vice principal & former school commissioner, public primary school)

The interview was done in Korean and hence had to be translated into English.

MJK: As you know, happiness is very amorphous in nature, and everyone who uses the term would define and practice it in different ways. What does the terms happiness and happiness education mean to you?

Sunny: To me, happiness education is about students building their self-esteem and self-efficacy and in so doing that they are not comparing themselves with others. It is important that they are not feeling sad or devastated because of others – in fact, it is like having strong muscles ... Well, to me, anxiety and depression are the two opposite emotions to happiness. If students are capable of respecting themselves and doing something, that is what I call being capable of leading their own lives and making their own goals. To me, having these emotions equates with happiness.

MJK: I see. How do you think schools should teach these qualities?

Sunny: I think enabling students to make and realise their dreams on their own consists of a happy learning process. That's why students should not feel left behind or have a sense of defeat under the weight of competition- and performance-driven culture. And this is also why it is very important for educators not to grade students on a curve or rank them based on their performance. I think future policy discussions regarding curriculum and pedagogic innovation should be done in a context where it does not encourage excessive competition and hierarchy.

MJK: Thank you. Have you noticed any differences between a student who was allowed to develop and realise their dreams and interest at school and who did not have such an opportunity?

Sunny: I have, and those differences emerged from rather unexpected situations. For example, our school has a toilet on each floor, and there was this parent who constantly complained that one of the toilets was too messy. Of course, there is a chance that students will simply understand and follow if we “instruct” them to use the toilet more cleanly and orderly. But I thought students should be given a chance to identify what the problem is and discuss it amongst themselves to come up with a shared solution. So I visited each classroom and asked the homeroom teachers to spare me five minutes with their students. I then told the students about this complaint about the toilet and asked them what they would like to do. They began shouting out their thoughts and ideas, and we navigated through each of those thoughts. One student then mentioned that they would like to make a poster where they would write down a list of promises. So I asked that student to lead the poster project. Then other students volunteered themselves as well. This occasion taught me that most students have this kind of internal desire where they would like to express their minds, get recognised by others or lead others and that giving these opportunities [at school] is very important [for student’s personal development].

But as the students proceed from primary and lower secondary into upper secondary schools, the school culture gradually gets admission- and result-centred, and their belief in

their own capability changes. For example, if students perform poorly on their exams, they then draw the line on what they can and cannot do. It is during this process that their self-esteem, self-efficacy and happiness go down.

But when I visited an Innovation [upper secondary] School, I saw students discussing their sexual self-determination. Unlike [students I met in] non-Innovation upper secondary schools, these students seemed to be more expressive in their thoughts and were capable of logically explaining what self-determination means to their own lives. I saw their faces and they looked very confident and were delved into learning and discussing what it means to have agency in their lives.

MJK: That's wonderful. My understanding is that you have encountered these student-led discussions and problem-solving many times. I am curious to know where and on what occasions you see this happening at the primary school you are working.

Sunny: Nowadays, policy-wise, student-led committees (*or student councils*) are very much encouraged and, as such, active. Outside of these committee events, it really depends on teachers and their passions to lead new projects, especially for them to happen in classrooms. Even before we had these policies [that stress student autonomy] and I saw active student-oriented and student-government practices already in place in classrooms where teachers were willing to put more effort. Outside the classrooms, we run a 'student parliament' project, where primary, lower-secondary and upper-secondary students across the country gather together online and come up with their own policy plans.

MJK: I see. I assume there are specific competencies that you and your school deem as important. What are they, and how does the school teach them?

Sunny: Yes, for us at the primary school level, we run peer relationship and sociability programmes. As "homeroom" teachers, teachers go beyond delivering knowledge. They run group and team activities and, in so doing, make those competencies visible. Another reason why homeroom teachers play an active role in this is that they do day-life guidance. In this day-life guidance outside the classroom teachers can identify students' individual problems. Or if some have a fight or are in a trouble, teachers will guide them to listen, understand and respect each other. These kinds of day-life guidance are expanding especially these days due to Covid-19. Primary school students [who have not had a chance to develop their social skills] are so used to meeting each other online, and now when they have to meet each other in person, they tend to struggle with their social skills. That's what many of the teachers tell me these days. So we try to build their social competencies either by running project activities or enhancing guidance aspects.

MJK: Can you give me some examples of those project activities?

Sunny: Well, for example, when I say 'project activities' ... this might differ by each school, but for us, when the school encounters certain problems, teachers don't simply decide what to do or how much budget they would use on their own. We received a suggestion a while ago that upper primary students have difficulties in schools because they are not used to having menstrual periods and that the school should consider installing sanitary vending machines. [We made this a project activity and] students began discussing whether they need the machine or not and if they need it, where it should be installed. Then

they began discussing whether these pads should be available to anyone or if they need to implement a payment system to prevent students from overusing them. This then led to a bit of a moral discussion on conscience, which ended up with a poster with a list of sustainable promises. After that, they browsed the G-market website and purchased the machine that fits their budget and their needs the best.

Like this, I noticed that students themselves have been organising a lot of school events these days. It could be athletic events or environmental sustainability projects. We simply throw them some topics and then they would come up with their own plans – sometimes discussed in classroom units which then are passed onto student representative committee units. So, in short, we run a lot of project activities that involve this cycle of initiation, planning and execution.

MK: Thank you. So you have worked in school settings for more than 20 years. Have you noticed changes in the consensus of what a happy school looks like? From what you told me it seems like a happy school nowadays is where students' autonomy is respected.

Sunny: That's right. In the past, [primary school] children were considered as the subject of care and their voices were heard only on the basis of whether they are saying right or wrong answers from the knowledge perspective. But recently teachers are opening up and they are increasingly recognising students not just as subjects of care but as agents in themselves. Students are also voicing out for their agency. We had a teacher-student discussion a while ago and this is what our students told us: 'Student questionnaires need to be changed. When the school circulates a multiple-choice questionnaire asking students to choose among the options, that is not really a gesture of respect [of students' autonomy]. The school [teachers] has already streamlined the options themselves and put good-enough ones into the questionnaire so that it won't go unexpected. We [students] are basically forced to choose among them.' To put it short, what I learned was that we need to start by reconceptualising what we ask students. That is, it is not about asking what they want from what we [the teachers] have streamlined, but we need to start from scratch by asking what they like and what they really want. I think the consensus [among school actors] about happy school is moving towards this direction, driven by discourses of innovative education led by the Gyeonggi Provincial Office of Education, teacher-responsible education, and by continuing professional development and professional learning communities outside of schools.

Appendix 7. Response frequency and percentage of respondents (n=50) with mode and median

Statement (Brief)*	Response frequency (%)						Mode	Median
	0 (%)	1 (%)	2 (%)	3 (%)	4 (%)	5 (%)		
1. Wide knowledge of core subjects	0 (0)	0 (0)	3 (6)	16 (32)	19 (38)	12 (24)	4	4
2. General knowledge of the local environment	0 (0)	0 (0)	5 (10)	11 (22)	23 (46)	11 (22)	4	4
3. Knowledge beyond immediate experience	0 (0)	1 (2)	1 (2)	9 (18)	24 (48)	15 (30)	4	4
4. Convey meaning clearly through writing and speech	0 (0)	1 (2)	2 (4)	10 (20)	20 (40)	17 (34)	4	4
5. Acquire information by themselves	0 (0)	2 (4)	0 (0)	12 (24)	16 (32)	20 (40)	5	4
6. Make reasoned judgements and decisions	0 (0)	1 (2)	0 (0)	4 (8)	17 (34)	28 (56)	5	5
7. Knowledge of Fourth Industrial Revolution technologies (e.g., AI, Big Data)	0 (0)	1 (2)	3 (6)	14 (28)	18 (36)	14 (28)	4	4
8. Critical attitude towards information from mass media	0 (0)	0 (0)	1 (2)	6 (12)	22 (44)	21 (42)	4	4
9. Utilise digital tools to create and share content	1 (2)	0 (0)	3 (6)	13 (26)	18 (36)	15 (30)	4	4
10. Creativity convergence competency	0 (0)	0 (0)	1 (2)	7 (14)	18 (36)	24 (48)	5	4
11. Competencies essential in the labour market	0 (0)	0 (0)	6 (12)	15 (30)	15 (30)	14 (28)	3	4
12. Knowledge and lifestyle essential for good health	0 (0)	0 (0)	0 (0)	7 (14)	15 (30)	28 (56)	5	5
13. Knowledge and attitude towards sex and reproduction	0 (0)	0 (0)	3 (6)	7 (14)	15 (30)	25 (50)	5	4.5
14. Knowing what to do in emergencies	0 (0)	0 (0)	2 (4)	4 (8)	17 (34)	27 (54)	5	5
15. Knowledge and skill for some art-making	0 (0)	1 (2)	6 (12)	13 (26)	19 (38)	11 (22)	4	4
16. Communicate feelings through art	0 (0)	1 (2)	1 (2)	14 (28)	15 (30)	9 (18)	5	4
17. Understand aesthetic experiences and talk about them	0 (0)	1 (2)	2 (4)	11 (22)	20 (40)	16 (32)	4	4
18. Understanding emotions	0 (0)	0 (0)	1 (2)	5 (10)	15 (30)	29 (58)	5	5
19. Self-realisation: recognising strengths and weakness and setting goals accordingly	0 (0)	0 (0)	0 (0)	3 (6)	10 (20)	37 (74)	5	5
20. Ability to control behaviour and emotion	0 (0)	0 (0)	0 (0)	6 (12)	13 (26)	31 (62)	5	5
21. Encourage them to develop in their own ways.	0 (0)	0 (0)	0 (0)	3 (6)	8 (16)	39 (78)	5	5

22. Form a considered opinion and act upon it	1 (2)	2 (4)	1 (2)	10 (20)	20 (40)	16 (32)	4	4
23. Happy, cheerful, and well-balanced	0 (0)	0 (0)	0 (0)	4 (8)	13 (26)	33 (66)	5	5
24. Enthusiastic and eager to put in best efforts	1 (2)	0 (0)	4 (8)	9 (18)	16 (32)	20 (40)	5	4
25. Finding enjoyment in learning and satisfaction from achievements	0 (0)	0 (0)	2 (4)	6 (12)	13 (26)	29 (58)	5	5
26. Creativity	0 (0)	1 (2)	1 (2)	13 (26)	20 (40)	15 (30)	4	4
27. Adaptability and flexibility in outlook	0 (0)	0 (0)	0 (0)	4 (8)	15 (30)	31 (62)	5	5
28. Questioning attitudes towards their surroundings	0 (0)	0 (0)	1 (2)	5 (10)	14 (28)	30 (60)	5	5
29. Labour market and career goals	0 (0)	0 (0)	3 (6)	15 (30)	14 (28)	18 (36)	5	4
30. Finding own meaning and purpose in life	0 (0)	0 (0)	1 (2)	1 (2)	8 (16)	40 (80)	5	5
31. Teach the meaning of happiness and the attitude to live a happy life.	0 (0)	0 (0)	1 (2)	2 (4)	10 (20)	37 (74)	5	5
32. Developing social skills	0 (0)	0 (0)	1 (2)	2 (4)	16 (32)	31 (62)	5	5
33. Active and good participant in discussions	0 (0)	0 (0)	1 (2)	4 (8)	20 (40)	25 (50)	5	4.5
34. Showing tolerance and respect to others	0 (0)	0 (0)	2 (4)	5 (10)	19 (38)	24 (48)	5	4
35. Sense of community	0 (0)	0 (0)	2 (4)	4 (8)	13 (26)	31 (62)	5	5
36. Moral values (e.g., responsibility, honesty, and diligence)	0 (0)	1 (2)	1 (2)	4 (8)	16 (32)	28 (56)	5	5
37. Using digital technologies to become a member of the global community	1 (2)	0 (0)	2 (4)	14 (28)	17 (34)	16 (32)	4	4
38. Global citizen	0 (0)	0 (0)	1 (2)	2 (4)	15 (30)	32 (64)	5	5
39. Well-being of the community and the earth as a whole	0 (0)	0 (0)	1 (2)	2 (4)	17 (34)	30 (60)	5	5
40. Understanding and promoting sustainable development	0 (0)	0 (0)	1 (2)	4 (8)	15 (30)	30 (60)	5	5

* The statements here do not follow the order of the actual survey questionnaire. They are sorted based on their category (an aspect of development).

*0 = Should NOT be the aim of education; 1 = Of no importance; 2 = Of low importance; 3= Of medium importance; 4 = Of high importance; 5 = Of extremely high importance