UCL Institute of Education

Buying and selling education policies: Educational reform in the Gulf

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Declaration

I, Maryam Mohamed, 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. The total word count for this thesis is 77,842 words.

Maryam Mohamed
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ABSTRACT

At the turn of the 21st century, the Arabian Gulf States were confronted with major challenges: mainly, their unsustainable dependence on oil and a rapidly growing domestic labour force, and a labour market that is dependent on migrant workers. This is against the backdrop of globalisation and the emergence of a global system of educational governance. In response, they invested heavily in 'transformational' reforms, producing a set of economic visions, which exhibited strong similarities. These were framed as long-term modernising investments in human capital designed to address the economic challenges as well as promote the nation's branding. Education was portrayed as the key driver of reform and any serious attempt to compete in the global economy therefore required ambitious educational reforms.

This study critically analyses the approach to education reforms in the region. A comparison of these reveals a distinctive model that is characterised by commonalities in defining the deficiencies of the education system and how it falls below expectations when compared with other nations on educational league tables. The reforms were based on identifying and transferring ‘international best practices’ from top performing education systems. More importantly, they were justified, designed and implemented by private sector consultants and other members of the Global Education Industry (GEI) using a distinctive governance model.

I demonstrate how the GEI is embedded in all stages of policymaking; how it effectively operates as a shadow education ministry which relies on a substantive form of policy borrowing that revolves around the transaction of products, termed ‘international best practices’; and the approach has been largely ineffective when judged against its own metrics. I also demonstrate how the concept of ‘context’ is

employed to both market the services of the GEI and to locate the sources of failure *in the domestic context.*

This study offers a critical insight into the role of the GEI in educational policymaking in a region that is not adequately explained by the literature. I argue that the region's approach provides a vision of the future as nations are increasingly influenced by the power of global governance, the privatisation of policymaking and the GEI. I show how the Gulf's approach has resulted in unintended effects that undermine the reforms and will generate a new form of dependency.

Impact Statement

This research explores the educational policy making process in a region that is under researched and not well understood in academic literature; it brings a 'qualitative' in-depth understanding of how and why public policy is designed and implemented in the countries of the Arabian Gulf.

The analysis presented in this thesis has potential impact **within academia**, as a contribution to knowledge in the fields of Comparative Education (CE) and Political Science (PS), and more generally to the literature around the Gulf. My findings contribute to the CE and PS literature with a particular focus on the conceptualisations of the two interrelated topics of 'context' and 'transfer' and the role of the GEI. The approach to reforms identified in this research has three implications for the conceptualisation and analytical models of policy borrowing/ transfer. Firstly, the Gulf's approach appears to the wholesale adoption of the logic of the GEI which results in a commercial form of policy borrowing that goes beyond the existing portrayals of policy borrowing as a symbolic, discursive and legitimatory exercise designed to create political coalitions or mobilise aid. Secondly, the approach identified in this study combines features of the voluntary and coercive forms of policy transfer. Thirdly, and as a result to the extensive involvement of the GEI at the level of 'state work', a contemporary form of comparative education which centres on 'selling to the other' has emerged in the Gulf. As educational policy making is becoming increasingly globalised and less related to the idiosyncrasies of its local context, the impact of the findings could extend **beyond the Gulf region** due to its hybrid characteristics that combines features of the developed and developing nations.

This study also has a potential impact **outside academia** as a complementary, or an alternative, to the dominant positivist form of 'policy analysis' driven by international organisations, think tanks and private sector consultants. My analysis of the approach to educational policymaking shows it is strongly embedded within the thickening global governance regime, and particularly in the Gulf where there is a deficiency of local capacity. Therefore, and based on my findings, I argue that Gulf policymakers and educationalists could capitalise on the recent developments, especially in relation to the adoption of the SDGs, as an opportunity to improve the educational policymaking process and ensure less dependency.

Moreover, on the **personal level**, this research has had an impact on my own personal and professional development. I have spent more than a decade at the educational policymaking level in Bahrain operating under the dominant positivist approach to 'policy analysis'. This research has helped me expand my view beyond the narrow economic definition of the educational problem. The implication of this is that I will return to my policymaking position in Bahrain equipped with a wider perspective that is more sensitive to local context. More importantly, I will be in a better position to manage and facilitate the work between the GEI and local stakeholders now that I have gained practical experience in consultancy, policymaking and academia.

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Table of Contents

DECLARATION **1**

ABSTRACT **2**

IMPACT STATEMENT **4**

ACKNOWLEDGEMENTS **6**

TABLE OF CONTENTS **7**

LIST OF FIGURES **9**

LIST OF TABLES **10**

LIST OF APPENDICES **11**

LIST OF ACRONYMS **12**

CHAPTER 1 INTRODUCTION **14**

1.1 EDUCATION REFORMS IN THE ARABIAN GULF STATES 16
1.2 THE RESEARCH QUESTIONS 20
1.3 PERSONAL MOTIVATION 25
1.4 RESEARCH CONTRIBUTIONS 27
1.5 THESIS STRUCTURE AND OUTLINE 28

CHAPTER 2 LITERATURE REVIEW: POLICY BORROWING, TRANSFER AND THE GLOBAL EDUCATION INDUSTRY **32**

2.1 EDUCATIONAL TRANSFER: HISTORICAL AND THEORETICAL PERSPECTIVES 34
2.2 ANALYTICAL MODELS OF EDUCATIONAL TRANSFER 39
2.3 LITERATURE FROM AND ABOUT THE GULF 46
2.4 THE GLOBAL EDUCATION INDUSTRY 55

CHAPTER 3 METHODOLOGY **66**

3.1 DEVELOPING THE RESEARCH FOCUS 67
3.2 INSIDER POSITION 68
3.3 RESEARCH QUESTIONS AND DESIGN 71
3.4 METHODOLOGICAL AND EPISTEMOLOGICAL IMPLICATIONS 74
3.5 DATA COLLECTION AND ANALYSIS METHODS 75
3.6 CHALLENGES, QUALITY OF RESEARCH AND ETHICAL CONSIDERATIONS 89

CHAPTER 4 PROBLEMATISING 'CONTEXT(S)' OF EDUCATIONAL POLICYMAKING IN THE GULF **96**

4.1 CONTEXT AND TRANSFER 97
4.2 POLICY FRAMING 101

4.3 CONTEXT AS A FRAMING DEVICE 105
4.4 ANALYSIS 106
4.5 DISCUSSION 134

CHAPTER 5 BEYOND THE GEI'S CONCEPTUALISATION OF CONTEXT 137

5.1 ANALYSIS OF CONTEXTS BEYOND THE GEI'S FRAMING 140
5.1 DISCUSSION: THE MULTIPLE CONTEXTS OF EDUCATIONAL POLICYMAKING IN THE GULF 168

CHAPTER 6 THE APPROACH TO EDUCATIONAL REFORMS IN THE GULF 172

6.1 ANALYSIS: EDUCATIONAL REFORMS IN THE GULF 174
6.2 DISCUSSION 211

CHAPTER 7 THE OUTCOMES OF REFORM 218

7.1 OUTCOMES OF THE REFORMS IN THE GULF STATES 221
7.2 OUTCOMES OF BAHRAIN'S REFORM 257
7.3 DISCUSSION 267

CHAPTER 8 DISCUSSION AND CONCLUSION 271

8.1 SUMMARY OF CHAPTERS 271
8.2 CONTRIBUTIONS, LIMITATIONS AND THE FUTURE 276
8.3 THE FUTURE OF EDUCATIONAL POLICYMAKING IN THE GULF 282

REFERENCES 292

List of Figures

Figure 3-1 Selecting interviewees 83
Figure 3-2 Coding Frame 85
Figure 3-3 Sample of material segmentations 87
Figure 4-1 Analysis Levels 107
Figure 4-2 The World Bank's suggested reform framework 117
Figure 6-1 Bahrain's reform governance structure during the strategy phase 178
Figure 6-2 Kuwait's Integrated Education Reform conceptual model 184
Figure 6-3 Qatar's reform governance Options 193
Figure 6-4 Saudi's service providers 200
Figure 6-5 ADEK's Priorities to Elevate Education Quality 208
Figure 7-1 TIMSS Maths 2015: The performance of Grade 8 Gulf States' students in relation to TIMSS benchmarks 253
Figure 7-2 TIMSS Science 2015: The performance of Grade 8 Gulf States' students in relation to TIMSS benchmarks 254
Figure 7-3 Grade 8 performance by gender on TIMSS 2015-2011 255
Figure 8-1 Mapping Oman Vision 2040 Strategic Directions to SDGs 284
Figure 8-2 Oman Vision 2040 Strategic Direction for Education 285

List of Tables

Table 2-1 Comparative education and motivations for borrowing 38
Table 2-2 Comparison of analytical devices 44
Table 2-3 Nature of consultants involvement in policy work 65
Table 3-1 Research design 74
Table 3-2 Sample of primary source documents at each level of analysis 79
Table 3-3 Interview Participants 84
Table 3-4 Categories of main coding frame applied as chapter headings..... 88
Table 4-1 Summary of publications analysed at each level 108
Table 5-1 Economic Visions 160
Table 5-2 Overview of the Gulf Stats' commonalities 162
Table 5-3 Summary of analysis discussion 171
Table 6-1 Bahrain's reform initiatives and service providers 180
Table 6-2 Kuwait’s reform initiatives and service providers 185
Table 6-3 Oman's reform initiatives and service providers 189
Table 6-4 Qatar’s initiatives and service providers..... 195
Table 6-5 Saudi's reform initiatives 199
Table 6-6 Education Challenges in Abu Dhabi 207
Table 6-7 Abu Dhabi's reform initiatives and service providers 210
Table 6-8 K-12 Education Reforms in the Gulf 212
Table 7-1 Aims, KPIs, outcomes and perceptions of Gulf reforms 247
Table 7-2 Aims and KPIs of future reforms in the Gulf 251
Table 7-3 Overall TIMSS results for all Gulf States since 1995 251
Table 7-4 PISA results 256
Table 7-5 PIRLS results 256
Table 7-6 Main initiatives of the Bahraini reforms and progress 258
Table 7-7 Comparison between MOE and BQA results 260

List of Appendices

Appendix 1: Interview Protocol …...……..……319

Appendix 2: Definitions of Categories and Subcategories...…..….……322

Appendix 3: Interviewee Information Sheet …..…….…...…….325

Appendix 4: Consent Form Template ...……..327

List of Acronyms

AD	Abu Dhabi
ADEK	Abu Dhabi Department of Education and Knowledge
AHDR	Arab Human Development Report
AMT	Arabic Medium Teachers
BCG	Boston Consulting Group
BQA	Bahrain Education and Training Quality Authority
BTC	Bahrain Teachers College
CE	Comparative Education
CFBT	CfBT Education Trust (formerly the Centre for British Teachers)
CTB	California Testing Bureau
EC	Education Council
ECE	Early Childhood Education
EDB	Economic Development Board
EFA	Education for All
EMSA	External Measure of Student Achievement
EMT	English Medium Teachers
ERB	Education Reform Board
ETEC	Education and Training Evaluation Commission
ETS	Educational Testing Service
FNC	Federal National Council
FSC	Federal Supreme Council
GCC	Gulf Cooperation Council
GDP	Gross Domestic Product
GEI	Global Education Industry
GEMS	Global Education Management Systems
GERM	Global Education Reform Movement
GTZ	Deutsche Gesellschaft für Internationale Zusammenarbeit (German society for technical cooperation)
HDI	Human Development Index
IBRD	International Bank for Reconstruction and Development
ICT	Information and Communication Technology
IEA	International Association for the Evaluation of Educational Achievement
ILSA	International Large-Scale Assessment
K-12	Kindergarten to Grade 12
KHDA	Dubai's Knowledge and Human Development Authority
KPI	Key Performance Indicator
KSA	Kingdom of Saudi Arabia
MDG	Millennium Development Goal
MENA	Middle East and North Africa
MESA	Maths English Science and Arabic
MOE	Ministry of Education

MOHE	Ministry of Higher Education
NCED	National Centre for Education Development
NIE	National Institute of Education
NSM	New Schools Model
OECD	Organisation for Economic Cooperation and Development
OFDPM	Office of the First Deputy Prime Minister
Ofsted	Office for Standards in Education
OPEC	Organisation of the Petroleum Exporting Countries
PEEC	Public Education Evaluation Commission
PIPS	Performance Indicators in Primary Schools
PIRLS	Progress in International Reading Literacy Study
PISA	Programme for International Student Assessment
PMO	Project Management Office
PPP	Private-Public Partnerships
PS	Political Science
QCA	Qualitative Content Analysis
RFP	Request for Proposal
SC	Supreme Council
SCET	Supreme Council for Education and Training
SDG	Sustainable Development Goal
SEC	Supreme Education Council
SQA	Scottish Qualifications Authority
STEM	Science Technology Engineering and Mathematics
SWOT	Strengths Weaknesses Opportunities and Threats
T4EDU	Tatweer for Educational Services
TAN	Transnational Advocacy Network
TIMSS	Trends in International Mathematics and Science Study
UAE	United Arab Emirates
UNDP	United Nations Development Programme
UNESCO	United Nations Educational Scientific and Cultural Organization
UOB	University of Bahrain
WB	World Bank

Chapter 1 **Introduction**

In recent years, education has increasingly been portrayed as a tool for development, and, more specifically, a driver of economic growth through investment in human capital. This widely held assumption, which often seems to be taken for granted, rather than demonstrated, has been embraced and promoted by international organisations such as the World Bank (WB) and the Organisation for Economic Cooperation and Development (OECD) (OECD, 1998; World Bank, 2018). It has also been endorsed by some academic researchers reinforcing the assumption of a causal connection between education and economic development (Hanushek and Woessmann, 2010; 2012).

Consequently, governments aspiring to compete in the modern economy have been encouraged to place educational reforms at the top of their policy agendas. Economic considerations have become central to educational policymaking as governments seek to improve economic growth through investments in education to enhance the quality of human capital. In parallel, this process has been facilitated by the provision of quantifiable comparative data on pupil performance, such as those from the Programme for International Student Assessment (PISA) and the Trends in International Mathematics and Science Study (TIMSS) that directly compare pupil performance in different countries. These International Large-Scale Assessments (ILSAs) claim to measure the quality of schooling and evaluate the success of investment in education.

Along with their claim to provide evidence on the effectiveness of policies and reforms, the international comparative data are also said to provide policymakers around the world with lessons on ‘what works’. They do this through a series of reports that compare top performing systems and identify common policy practices.

The OECD's 'PISA in Focus', a series of concise monthly education policy-oriented notes on a specific a PISA topic is an example (OECD, 2018b), which suggests policies or 'international best practices' that could and *should* be emulated to improve the quality of schooling. The emergence of these ILSAs, the practice of constant competitive comparisons, and the suggestion that policies and best practices of high performing nations can be readily transferred between nations, has created a new form of global governance in education (Ozga, 2009).

The demand for educational reforms in support of economic development and the new mode of global governance in education have also created opportunities for non-state actors to influence education policy agendas. International organisations such as the OECD and WB, along with educational businesses and private sector consultancies, have entered the policymaking arena and assumed roles that were once the exclusive function of the state (Ball, 2009; 2012). Steiner-Khamsi (2016b) notes that these actors are benefiting from the new form of governance, which is reinforced as policymakers seek to avoid many of the ideological difference which have inhibited education reform and allows policymakers to portray their policy decisions as non-ideological and evidence-based (Tröhler, 2015). These developments have created 'an increasingly globalised economic sector in which a broad range of educational services and goods are produced, exchanged and consumed, often on a *for-profit basis*'; this sector is now referred to as the Global Education Industry (GEI) (Lubienski, Steiner-Khamsi and Verger, 2016).

Thus, arguably, in this GEI, International Organisations act as the 'suppliers' of 'scientific' data that inform the policymaking process. Policymakers in individual countries become 'clients' increasingly looking for 'best practices' and evidence based methodologies to support educational improvement in their systems and policy

entrepreneurs, consultants and education businesses become the main 'brokers' mediating between the 'suppliers' and 'clients'. However, Verger, Steiner-Khamsi and Lubienski recognise that, despite its common features, 'the GEI is evolving in a variety of ways in different territories and in relation to different educational markets' (2017, p. 326).

This study focuses on the *for-profit transactions* comprising a menu of educational reforms that are being sold and bought in what appears to be a distinctive educational market: The Arabian Gulf.[1]

1.1 Education reforms in the Arabian Gulf States

The Arabian Gulf region, a fast-growing educational market (Hoteit *et al.*, 2018), offers a rich illustration that portrays extreme forms of the interactions and transactions between nation states and members of the GEI. The six wealthy oil monarchies of the region (Bahrain, Kuwait, Oman, Qatar, Kingdom of Saudi Arabia (KSA) and the United Arab Emirates (UAE)) are heavily dependent on revenues from oil, which are subject to short-term volatile price and demand oscillations as well as being a finite source in the longer term. They have also been characterised by low levels of educational achievements and high population growth over the past two decades, which despite the oil wealth, has stretched the resources of the governments to provide support to their citizens, and has resulted in a rapidly growing demand for employment from Gulf nationals in domestic labour markets that have traditionally been dependent on foreign workers (Baldwin-Edwards, 2011).

[1] In this thesis, I refer to the six member-states of the Gulf Cooperation Council as the Gulf States, the Arabian Gulf or the Gulf region.

These conditions have created a climate ripe for consultants to thrive (Bianchi, 2016). It has been calculated that in 2018 the Gulf consulting market was worth more than $3 billion in revenues, and continues to grow at 9.1 percent rate annually (Bridge, 2019).

At the start of the new millennium, the Gulf States were wealthy 'clients' who were eager to invest in their human capital, and diversify their economies away from oil, and become more competitive regionally and globally. They each launched ambitious large-scale educational reforms designed to emulate the features of the top performing education systems around the world. The reforms were developed, implemented and often evaluated by a consortium of the world's most renowned management consultancy firms and international education experts who acted as 'brokers', harnessing the data of the international organisations, the 'suppliers', such as the results of TIMSS and PISA.

Before the discovery of oil in the 1930s, there was hardly any form of formal schooling in the Gulf. But, since then, these countries have made significant quantitative leaps in expanding their education systems, supported by oil revenues. Today, there are more than 9 million students, enrolled in more than 400,000 schools (GCC-Stat, 2012). Collectively, the Gulf countries dedicate an average of 14.1 percent of their GDP to the education sector, a high proportion compared with other developed countries (Alpen Capital, 2018). Despite these achievements of high participation and high investment, the quality of education was and is perceived to be poor by the Gulf States' governments when measured against international benchmarks and thus does not meet their future economic aspirations.

The perception of poor performance has been repeatedly reinforced in international agencies' reports that use ILSAs and global comparative indicators as

metrics to measure the quality of the education systems. For example, the Arab Human Development Reports (AHDR) series between 2002 and 2016 and the World Bank's development report of 2008 titled *The Road Not Travelled: Education Reform in the Middle East and North Africa* conclude that the quality of the education system in Arab countries does not meet the needs of the 21st century (Abi-Mershed, 2010; Alayan, Rohde and Dhouib, 2012). Much of the academic scholarship concerned with the region has been influenced by these reports calling for the 'kind of education needed' (ECSSR, 1999) in which education goals (and benefits) are presented almost wholly in economic terms.

In response to these concerns, the Gulf States launched educational reform programmes around the start of the new millennium. **Qatar** partnered in 2001 with RAND Corporation, an American non-profit global policy think tank, for a massive overhaul of the entire education system under the 'Education for a New Era' reform, with the aim to transform its education system into an exemplary 'World-Class' system that would prepare young Qataris to participate in the knowledge economy (Brewer *et al.*, 2007). **Bahrain** introduced its educational reforms in 2005; led by the country's Economic Development Board (EDB) and McKinsey & Company, an international management consultancy firm, to improve the performance of the education system and meet the needs of the 21st century (EDB, 2006). Both **Oman and Kuwait** partnered with the WB for the same reasons (World Bank, 2012; 2014). Similarly, the **UAE's emirates of Abu Dhabi and Dubai** launched their reforms around the same time and partnered with several consultancies from Australia, the UK and the United States, which focused on the development of model schools (Government.ae, 2018a). Lastly, **Saudi Arabia** has invested more than $22 billion since 2003 to improve the quality of its education system through international

partnerships with consultants, such as the Boston Consulting Group (BCG) and education businesses such as Pearson, to restructure their education system's governance and increase the role of the private sector in education (Tatweer, n.d.-a).

While there were distinctive aspects to the reforms in each of the six states, the commonalities of the approach were more prominent. All six states have clearly justified their education reforms through the lens of Human Capital theory, placing great emphasis on the role of the education system in achieving economic goals. In doing so, they commissioned commercial GEI agencies who 'sold' global best practices that were 'borrowed' from the world's top performing systems.

Despite the massive resources that were dedicated to these educational reforms in the Gulf over the last 25 years, the consensus about their impact indicates that the desired outcomes have not been achieved, especially when measured against the predetermined 'measures of success' or 'key performance indicators (KPIs)', as stated in the reform documents. School students in the Gulf continue to perform well below international benchmarks on ISLAs.

'Policy borrowing' has been the term used in comparative education literature to describe the transfer of policies and practices from one nation to the other, and has been central to educational reforms especially since the 19th century (Ochs and Phillips, 2004). Research around the topic provides many empirical examples as far back as the establishment of national school systems when local educationists looked to foreign examples that could be borrowed. The UK's interest in the German schooling system and Japan's educational reforms during the Meiji period (1860s) and the post-World War II periods (Shibata, 2004) are conspicuous and early examples of the centrality of policy borrowing practices in educational reform. In recent years, the practice of educational policy borrowing has changed in nature and

increased in intensity with the availability of international comparative data on school system performance and the proliferation of non-state agencies now active in the education reform market. With these developments, research around this topic has grown exponentially over the last two decades (Steiner-Khamsi and Waldow, 2012). However, despite the significant contributions this research has made, little attention has been given to the nature of policy borrowing in the Gulf, and more, generally to the role of the GEI and its role in selling of international best practices.

In *prima facie* terms, the approach to educational reform in the Gulf represents a contemporary form of policy borrowing that is, in many respects distinct from the traditional forms of policy borrowing described in the current literature that focuses mainly on the West or Far East and between rich and poor nations. For example: policy borrowing in educational reforms in the Gulf appears to go beyond the symbolic referencing of foreign policy practices and it is not a condition of receiving aid. Moreover, the role of the GEI is critical and provides an insight into the nature of the global governance in education in a region where the functions traditionally viewed as the role of the state have been outsourced to the private sector.

1.2 The Research Questions

This thesis is based on the proposition that the approach to educational reforms in the Gulf is distinctive and is not adequately explained by the existing literature. I argue that this approach relies heavily on a contemporary form of 'policy borrowing', but one that is different from the traditional forms identified and discussed in the existing literature. I also argue that in its contemporary form, enabled by the contexts of policymaking in which it is conceived, it is characterised by the dominant role of the

GEI, specifically the private sector consultancies harnessing the data and the discourse of international organisations, especially the WB and the OECD.

Thus, the aims of this research are to 1) understand the contexts of educational policy making in the Gulf, 2) identify the features of this approach, including the ways in which this is distinctive from non-Gulf examples and 3) understand the nature of the contemporary form of 'policy borrowing' and the role of the GEI. Underlying this are the fundamental questions: *why* have the Gulf countries chosen to adopt this approach to reform, and *what* are its consequences for the progress of reform and the education systems in the region? To investigate this, I set out to answer three research questions that involve three levels of analysis:

RQ1: What are the 'contexts' of educational policymaking in the Gulf States?

The discussion of educational reform is an extension of the discussion about educational policy and practice. Therefore, an examination of the approach to educational reforms requires an understanding of their local policy context and how it influenced the policy process, encouraged policy borrowing and created opportunities for actors beyond the state to direct the policy agendas of the Gulf States.

In the earlier days of this research, I assumed that the local policy context could be identified and understood through a review of the policymaking literature about the Gulf; this would be presented in a background chapter at the outset of the study, which is viewed as 'standard' approach in PhD theses. However, the limitations in the literature discussing and analysing policymaking in the Gulf necessitated a different approach. The prevailing literature on educational policy in the Gulf tends to frame contexts in economic terms. This can be explained by the critical role of the oil in the economies of the Gulf, which is without doubt one of the

main factors characterising the region. Often, scholars researching the region adopt a political economy lens, which employs economic theories and related analytical tools to interpret political activities and how public policy is created and implemented (Heywood, 2013, p. 129). This method is widely used in scholarship concerned with the Gulf region and underlies most studies concerned with policymaking and reforms.

For example, the most influential economic theory applied to the study of politics and the role of the state in the Gulf is the Rentier Theory, which seeks to 'explain state society relations in states that generate a large proportion of their income from rents, or externally-derived, unproductively-earned payments i.e. oil and gas exports' (Gray, 2011). The theory was first advanced in by Hossein Mahdavy (1970) and revived in the 1990s in studies focusing on the Arab nation state (Beblawi, 1990). Despite originating in the late 20th century, the Rentier Theory remains widely adopted in studies seeking to understand the nature of the Gulf monarchies. However, the focus on economic theories simplifies rather than highlights the peculiarities of the Gulf States and their approaches to policymaking.

Similarly, there is a substantial body of literature produced by GEI actors that influences academic writing and informs educational policymaking in the region. A preliminary review of this literature suggests that the contextualisations of the Gulf countries in these documents describe them solely in economic terms. Thus, relying on a review of this literature to provide the contextual background for this study would confine my analysis within what is determined by the GEI as appropriate and relevant knowledge. By focussing solely on the economy, other critical factors embedded within the Gulf societies are simply overlooked.

Thus, ascriptions of the study's 'background' at the outset can operate as imposed categories that limit the understanding of the context. Sobe and Kowalczyk (2013) argue that contexts must be treated as a 'matter of concern' not a 'matter of fact'; 'Rather than thinking of "contextualisation" or "establishing the context" as an activity that takes place at the front-end as part of a preliminary "setting the stage" for a research project' (2013, p. 6), context must be problematised. Context is not neutral or performative, on the contrary, multiple contexts can be framed and mobilised in policy making (Piattoeva, Klutas and Souminen, 2019). Thus, my first research question aims to understand the context(s) of educational policymaking in the Gulf. Using the concept of framing from policy science, I analyse the approach to contextualisation the GEI's reports and demonstrate that the local economic context is used as a framing device to construct a policy narrative that legitimises and markets their expertise. I then contrast this with an analysis of the wider context and demonstrate that going beyond the GEI's framing could explain the region's reliance on the GEI, and on policy borrowing as well as the constraints to realising the aims of the educational reforms. I also demonstrate how the GEI changes its portrayal of the 'context' when it seeks to explain why reforms were not successful.

RQ2: What were the critical features of the approach to educational reforms in the Gulf over the last two decades?

The second question aims to identify, through a comparative analysis primarily of the relevant GEI literature, the critical features of this approach to educational reform in the six Gulf States. Although educational reforms in the Gulf encompassed the whole education system from basic to vocational and tertiary education, I will focus in my research on the reform of the Kindergarten to grade 12 (K-12) level of education. This is done for three reasons. First, focusing on one level will be manageable and

realistic for my doctoral studies; second, because K-12 reforms were better documented and are easier to access for the purpose of my research; and third, the approach to reform across all levels of education was identical. Thus, the approach to K-12 reforms can be taken as representative of the overall approach and captures the strategies used in the other levels.

The answer to this question represents the second level of analysis in this study which is organised around the following sub-questions aimed at identifying the critical features of the distinctive approach observed in the region:

- When were the reforms introduced and why?
- What were the main areas of reform?
- How were the reform programs designed and implemented?
- Who was involved?

RQ3: What were the outcomes of the reforms and how were they perceived by key stakeholders?

The final research question aims to explore what happened after the reforms were introduced through an analysis of their enactment. Although it includes a comparative element at the regional level, this level of analysis focuses on Bahrain's reform outcomes. I have selected Bahrain as an illustrative case for pragmatic reasons, which I will explain in the next section when I discuss my personal motivation. Bahrain is also one of the first countries in the region to introduce educational reforms and sustain them for a longer period of time. In contrast, reforms in the other Gulf nations were cancelled or changed several times. The Bahraini educational reform agenda remained consistent in its implementation throughout the phases and it is also well documented; it has gone through multiple evaluations, which can enrich the investigation and the analysis.

Despite the massive resources that were dedicated to education reforms in the Gulf over the last two decades, the consensus around their impact indicates that the desired outcomes were not achieved, especially when measured against the pre-defined performance indicators of the GEI. Consequently, the governments of the Gulf States commissioned several evaluation studies from the GEI to assess the reforms' progress, to understand the reasons for underperformance, and propose the next steps. Even though the GEI actors have not been successful in 'transforming' their education systems, the governments in the Gulf States continue to contract them for future reform initiatives. I do not undertake a comprehensive independent evaluation of the reforms; rather, I will draw primarily on the GEI's own reflections and evaluations of the reform outcomes which were largely defined with reference to improvements in pupil learning outcomes on ILSA's. The analysis then focuses on the perceptions of the stakeholders with regard to these outcomes.

1.3 Personal Motivation

Over the fourteen-year period that preceded my PhD, I undertook a variety of roles working on the educational reforms in Bahrain. I admit that I have unconsciously subscribed and contributed to the mantra of 'education for economic development'. I changed position from policymaker 'client' to consultant 'broker' many times, skipping opportunities to question many obvious assumptions.

In the early years of my career, I worked in a school as an Education Technology Specialist before I was assigned to assist a team of McKinsey and Company consultants who were at the time carrying out a diagnostic study of the Bahraini education system to understand the main causes of its underperformance. The team analysed international data, like TIMSS results and international

organisation reports and conducted many workshops and school visits. McKinsey reported that Bahraini students were performing below the international benchmarks and suggested that much work needed to be done to remedy this. In the years that followed, and as the education reform project advanced through its different phases, I moved to the EDB and assumed a the role of a Senior Associate while continuing to support the team of international consultants in researching the 'world's top performing education systems' to identify international best practices that Bahrain could learn from and emulate. The product of this phase formed the national reform strategy that was implemented from 2007. Finally, after completing my Masters in Business Administration (MBA) in Spain, I moved to the University of Bahrain (UOB) and was appointed as a Director in the newly established Bahrain Teachers College (BTC). The BTC was one of the reform's flagship initiatives. I found myself on the implementation side of the equation; implementing the international best practices I had participated in identifying for emulation. Not long into this role, I found myself in a frustrating position: the evidence-based policies I once helped identify and emulate were neither straightforward to enact nor did they seem to deliver the promised outcomes.

In 2015, when I was offered a scholarship by the UOB to do this PhD, I saw an opportunity to investigate the issues underpinning the implementation of the education reform strategy. I was so immersed in the evidence-based policy making process that questioning the policies and how these were developed never occurred to me. I accepted the prevailing logic; non-implementation and problems were the result of the reluctance and resistance to change by locals. A report by the Qatar Foundation published in 2015 on the impact of reforms in the other Gulf countries

suggested my experience, and perceptions at the time, were not limited to Bahrain (Alfadala, 2015).

However, when I started this study and broadened my reading beyond the realm of consultancy reports, it did not take me long to realise that, if these 'evidence-based' policies were so well designed, implementation should have been the next and successful step. But this was not the case.

My approach to the topic of this PhD study has been greatly influenced by my background and experience. I realise that as an 'insider' I have a unique opportunity to explore the approach to educational policymaking in the Gulf and the logic of the GEI, two areas that are usually very difficult for academic researchers to gain access.

1.4 Research Contributions

In this study, I explore a contemporary model of educational reform, which relies on an essentialised form of policy borrowing and the central role of the GEI. It is located in a region very different from the West and the Far East, and shares the underdeveloped capacity of 'developing countries', yet it is not dependent on financial aid. The findings of the research in this distinctive setting identify a form of applied comparative education and address a critical gap in the comparative education scholarship, especially around the concepts of 'transfer' and 'context' and their relation to one another. Cowen argues the intellectual problems produced by their conceptualisations have not yet been fully sorted out; and, although 'academic comparative education through the work of at least three generations of scholars has created a very attractive and complex intellectual agenda on "transfer" … We have done less well on the other motif: context' (2006, p. 567). Thus, by analysing the

GEI's applied comparative approach, this study offers insights to the conceptualisations of context especially in relation to transfer.

Additionally, this study contributes to the understanding of the GEI's approach, especially around their commercial interest in advocating the transfer of best practices. Central to that is the use of the local context as a framing device to mobilise policy and sustain their business model.

The Gulf countries are at a tipping point. With the results of the previous attempts at reforming their education system leaving them questioning the quality of implementation, a clear need for an alternative perspective supported by empirical data could provide a better-contextualised policy analysis to inform future reforms. At present the policy discourse in the Gulf is dominated by the reports, claims and assumptions of the GEI, who are basically *marketing* and *selling* their services. There is an urgent need for other voices than those of the GEI's and I hope this study can provide an independent scholarly analysis. After all, academic research can inform policy by critically analysing past or on-going practices and recommending future directions.

1.5 Thesis Structure and Outline

This thesis is divided into seven chapters that follow this introductory chapter. The three research questions are pursued through three interrelated levels of analysis presented in Chapters 4, 5, 6 and 7. To guide the analysis, a critical engagement with the literature is used as a starting point and presented in Chapter 2, and is followed by a detailed discussion of the research methodology in Chapter 3. Finally, a discussion of the findings and a conclusion are presented in Chapter 8. In what follows I briefly introduce the outline of each chapter.

Chapter 2: Literature review

I begin my study with a critical engagement of literature from two fields, comparative education and political science, to explore the concepts of 'policy borrowing', 'policy transfer' and the role of actors beyond the state in policymaking. Research on these concepts has grown exponentially over the past three decades, offering significant contributions to our understanding of their nature and how they operate. Thus, the aim of this chapter is to present a comprehensive review of the historical development of the concepts and the analytical models advanced within both fields. More importantly, this chapter highlights that, despite the advancements in both research fields, gaps and limitations exist when applying the analytical models to interpret reforms in the Gulf. The chapter demonstrates that existing research is based on empirical studies in contexts that are very different from the Gulf and concludes with a discussion of the implications of that for this study.

Chapter 3: Methodology

In Chapter 2, I argued that the existing analytical models and frameworks of policy borrowing and policy transfer are inadequate to interpret what is happening in the Gulf. I attempt in my analysis chapters to understand the distinctive political, economic and socio-cultural features influencing educational policymaking in the region before analysing the approach to reforms to identify its critical features. I emphasise in this chapter the importance of the qualitative approach I am adopting in this study. I argue that a qualitative approach will offer an in-depth understanding of the approach to policy making and reform in the Gulf; a region highly influenced and informed by quantitative and scientific reports produced by the GEI. This chapter also reflects on the challenges and the ethical considerations pertaining to this research.

Chapters 4 and 5: Contexts of Policymaking in the Gulf

In these two chapters, I address the first research question which corresponds to the first level of analysis in this study. Chapter 4 investigates the local policy context in the Gulf through an analysis of the GEI reports in order to explore their approach to contextualisation. In my analysis, I identify three types of reports emerged from this analysis and argue that the GEI uses some elements of the local context as a framing device to legitimise their expertise and serve their business model but downplay other critical contextual elements which I explore in more depth in in the next chapter. The analysis in Chapter 5 reveals that the elements downplayed could explain the reliance on the GEI but also determine the failure of their approach, thus explaining how the GEI uses the local context to justify the failure. The analyses in these two chapters provide an important foundation to support the next levels of analyses and mitigate the limitation in academic literature.

Chapter 6: Approach to Educational Reforms

This chapter identifies the features of the approach to educational reforms in the Gulf and addresses the second research question directly. The analysis employs a comparative approach of all six states, focusing on the K-12 reforms introduced around the turn of the 21st Century. The chapter concludes with a discussion of the distinctive features of the approach.

Chapter 7: Outcomes of the Reforms

This chapter addresses the third research question which corresponds to the third level of analysis in this study. I turn my attention towards what happened after the reforms were introduced by analysing the enactment of the reforms and their outcomes in all six states, but with a focus on Bahrain. The analysis reveals that the

approach to educational reforms in the Gulf has been of limited effectiveness when judged by its own metrics, yet, despite that it is still in use. The analysis also illustrates how local actors adopt the logic of the GEI, blaming the local context for failure in implementation whilst not questioning the approach itself. In doing so, the GEI is distanced from the outcomes of the reforms and continues to be relied upon. This continuous reliance negatively affects the local capacity-building; creating a vicious cycle of dependency.

Chapter 8: Discussion and Conclusion

The closing chapter reflects on the analyses presented in this study. It starts by considering the main arguments and propositions I presented above. I begin this chapter with a discussion of my findings drawn from on my analysis of the contexts framing the educational policymaking in the Gulf. I argue that these contexts created the conditions for a distinctive approach to educational reforms as well as their critical features and highlight the consequences for the education systems. Furthermore, this chapter focuses on the contribution of this study to the literature in Comparative Education (CE) and Political Science (PS). The limitations of this study are also considered before concluding with a reflection on the significance of the findings for the Gulf States.

Chapter 2 **Literature Review: Policy Borrowing, Transfer and the Global Education Industry**

Two concepts are central to the approach to educational reforms in the Gulf and to my thesis: the first is the 'transfer' of 'global best practices' and the second is the dominant role of the 'GEI'. Thus, this chapter is a review of the literature concerned with these two concepts. Cowen (2002) identifies 'transfer' as one of the unit ideas of the comparative education (CE) field and I use this body of literature as a starting point to establish an understanding of the concept, its developments and its centrality to educational policymaking and reforms. Transfer is also a topic of interest in political science (PS) (Dolowitz and Marsh, 1996; 2000), albeit from a different epistemological perspective as I will discuss later in this chapter. Therefore, a review of the latter body of literature offers an opportunity to compensate for some of the conceptual shortcomings within CE (Steiner-Khamsi, 2012).

Scholars and policymakers use different terms to describe the process through which educational policies, ideas, institutions or practices move across international borders. 'Policy transfer' appears to be a catch-all phrase that is widely used but mainly in PS. The term 'policy borrowing', though confusing as it implies returning the borrowed policy, is broadly accepted in the CE literature to differentiate between *transfer* as a 'normative aspect' and *borrowing* as an analytical object of study (Steiner-Khamsi, 2012). Other terms used include policy learning (in PS), policy lending, referencing, and attraction (in CE), and policy diffusion and convergence (in sociology and anthropology). Jakobi (2012, p. 393) argues that:

> Policy learning, lending and borrowing are part of policy transfer. Transfer may be part of policy diffusion – a large number of transfers constitute a diffusion pattern which may result in policy convergence.

In this thesis, I use the terms 'policy borrowing' and 'policy transfer'

interchangeably, mainly to situate my study within the CE literature.

This chapter is divided into three subsections. The first section is a review of the CE literature which focuses on its historical and theoretical developments before moving to the analytical models and frameworks that have been developed to analyse policy borrowing and transfer. I argue that these models have limited explanatory value when applied to educational reform practices observed in the Gulf. The second section explores the literature concerned with the educational reforms in the Gulf, and is divided around two bodies of literature: academic literature emerging from and about the Gulf, and the grey literature[2] comprising reports, analyses, and policy documents produced by government entities and members of the GEI operating in the Gulf. I demonstrate that, with the exception of the studies that mainly address reforms in higher education, there is a paucity of critical academic literature: scholars either assess the outcomes of the reforms or address normative questions such as 'what can we learn from elsewhere'? On the other hand, the grey literature, which appears to influence academic thinking and to inform policymaking in the Gulf region, is selective in its framing of the educational problems and adopts a normative approach. Finally, the third section of the chapter broadens the literature to explore the role of non-state actors in shaping educational policies; here, I focus on the GEI and its actors, particularly management consultants, who play a central role in the approach to educational reform and policymaking in the Gulf. I argue that, whilst at its core, as elsewhere, the GEI is selling products and services for a profit in the Gulf,

[2] This refers to 'the literature that is not formally published in sources such as books or journal articles' (Lefebvre, Manheimer, & Glanville, 2008), p. 106.

their approach in the region is characterised by a distinctive combination of features not explained by the existing literature.

2.1 Educational Transfer: Historical and Theoretical Perspectives

In the 19th century, Jullien de Paris started with efforts to create a 'science' of education and argued that education was independent from its social reality, and therefore it was possible to transport elements of education intended for improvement from one country to another (Fraser, 1964). He envisaged comparative education as a practical, positive science which operated within the logic of the Enlightenment[3] and focused on rational thought, scientific observation, and objective versions of reality (Beech, 2006). Approaches to comparative education have since gone through phases of development, captured by Nóvoa and Yariv-Mashal (2003) who place its development and motivations within the global climate. In what follows, I trace the developments and motives of policy borrowing along these phases.

Phase 1: 1880s - Knowing the Other

The first phase 'knowing the other' (Nóvoa and Yariv-Mashal, 2003, p. 424), which also reflects what Noah and Eckstein (1969) identified as 'traveller tales', revolved around the work of educationists such as Victor Cousin, Mathew Arnold and Horace Mann, who travelled to different parts of the world reporting on foreign education systems. At that time, exchange of information on foreign education systems was

3 'The Enlightenment is a philosophical movement that took place between mid-1600s and the early 1800s, mainly in Europe. It coincided with the 'scientific revolution', in which every aspect of human life began to be studies and understood in absolutes' (Portnoi, 2016, p. 85)

considered desirable and policy borrowing was based on that assumption. Examples of borrowing in this period include the establishment of national school systems around the world or the reforms undertaken by the Japanese Government during the Meiji Restoration as part of the wholesale importation of the elements of a 'modern' nation (Shibata, 2004).

Phase 2: 1920s - Understanding the Other

The second phase demonstrates how the diffusion of mass schooling, the ramifications of the World Wars, and the rise of the social sciences in the early years of the 20th century, created an interest in 'understanding the other' (Nóvoa and Yariv-Mashal, 2003, p. 424). In this phase, the interest in education policy carried the traveller reports beyond being merely descriptive into being more scientific, introducing the possibility of engineering reforms based on what could be learnt from the study of foreign systems. This stage also witnessed a rise in cautionary voices that doubted the possibility of educational transfer. Most famous amongst these was Michael Sadler who, in the 1900s, warned against borrowing policies and practices from foreign systems (Sadler, 1979). An important observation of the first two phases illustrates how educational transfer was characterised as a practice that occurred primarily between nation states through the individual reformer's initiative (Beech, 2006).

Phase 3: 1960s - Constructing the Other

In the 1960s, the collapse of colonialism, the emergence of new countries and the establishment of international organisations accelerated a process of global policymaking. Education was considered to be a main source of development. Nóvoa and Yariv-Mashal (2003) argue that the nature of comparison changed in this phase

and started to present different purposes and characteristics. This phase was termed ‘constructing the other’, and involved international organisations disseminating packaged policy solutions in order to help the ‘new’ and developing countries. During this period, debates shifted from whether educational transfer was desirable and possible, to the search for scientific methods that would guarantee the success of educational transfer. Holmes (1965) and Bereday (1964) for example tried to develop a scientific method for transfer, believing this could be an instrument of educational reform (Cowen, 2006).

In parallel, the desire to understand the global dissemination of educational policies motivated scholars to explore this phenomenon using different theoretical perspectives. Most prominent are World Culture Theory and World Systems Theory. World Culture theorists aim to ‘describe a long-term process of global isomorphism’ (Rappleye, 2012a, p. 27). The work on this theory was begun at Stanford University by sociologists Francisco Ramirez and John Meyer in an attempt to understand the rise of mass schooling and the increasing similarity of education policies across nations despite their different local contexts (ibid). Education was the main site of theorisation in their work, so much so that it became one of the most commonly cited perspectives for understanding how globalisation impacted education (Portnoi, 2016).

In contrast, World Systems Theory, developed by US sociologist Immanuel Wallerstein, suggests that educational ideas and practices which favour economically rich nations are imposed on states, adopting tenets similar to dependency theory and the postcolonial theory (Portnoi, 2016). These theories emerged as critiques of approaches that emphasise a common form of development for all nations. World Systems Theory is not, as commonly cited in CE literature, the same as World

Culture Theory, but many studies of research on transfer in postcolonial and developing nations adopt its perspective (e.g. Takayama and Apple, 2008; Tarlau, 2017).

The important contributions of the critical research in this period include introducing the problem of agency into the discussion of transfer. Individual travelling educationists and nation states were no longer the only actors involved in transfer, as non-state actors such as international organisations got involved (Beech, 2006), necessitating a distinction between voluntary and coercive acts of transfer (Ochs and Phillips, 2004).

Phase 4: 2000s - Measuring the Other

The acceleration of global economic integration in the 1970s and the increased interest in, and debates around, the economic value of education (e.g. Psacharopoulos and Woodhall, 1985), sparked what led to the latest development in the theme of educational transfer and arguably changed its nature to its contemporary form. By the end of the 20th Century, globalisation, technological advancements, and the rise of a system of global governance changed the motives for comparisons towards what Nóvoa and Yariv-Mashal (2003) described as 'measuring the other'. The focus of much of the comparative research during this period was/ is inspired by the need to create international tools such as PISA, TIMSS and standardised global comparative indicators to measure the 'efficiency' and the 'quality' of education. High performing countries were assumed to have efficient and high quality educational systems, and to be a source of 'best global practices' that other nations should emulate. Nóvoa (2018) recently described this as 'prescribing to the other'. Such developments appear to be the contemporary revival of Jullien's plan for the 'science' of education.

In Table 2-1 below I summarise the phases of the developments in comparative education based on Nóvoa (2018) and Nóvoa and Yariv-Mashal (2003) phases, together with the implications for policy borrowing based on the review of the literature above. Among other things, this historical overview of developments illustrates the centrality of educational transfer in the development of national education systems and their reforms.

Period	Form	Description	Policy Borrowing
1880s	Knowing the other	Curiosity to 'know' other countries. Initially the reports of the travellers were rarely explanatory and concentrated on descriptions. At a later stage the travellers had a specific educational focus and a desire to understand other nations.	Borrowing was based in individual/ nation interest: Traveller tales Japanese Meiji Reforms
1920s	Understanding the other	The end of World War I created a need for urgent cooperation and understanding, which led to a natural need to compare.	Borrowing was based in individual/ nation interest: Diffusion of mass schooling
1960s	Constructing the other	The beginning of direct export of educational ideas; post-colonialism led to approaches aimed at spreading 'progress' to developing countries	Borrowing goes beyond individual/ nation state and classified as voluntary/ coercive International organisations begin disseminating packaged reforms
2000s	Measuring and prescribing to the other	Large scale international comparisons; a belief in education as an essential component of economic and social advantages	Borrowing goes beyond individual/ nation state and classified as voluntary/ coercive New actors with commercial interest are involved Outcome Based Education, Global Education Reform Movement (GERM) ILSAs such as PISA and TIMSS

Table 2-1 Comparative education and motivations for borrowing

The key development in educational policymaking in the early 21st century, viz. the growing influence of global governance has prompted the emergence of two distinct approaches within contemporary CE. The first is applied and normative and advocates the borrowing of policies using comparative data to identify and promote best practices. The work of the OECD and consultancies (Barber, Chijioke and Mourshed, 2010; Barber and Mourshed, 2007; Tucker, 2011) are illustrative. The

second approach adopts an interpretive perspective and asks questions designed to understand when, why and how policy borrowing occurs, whether it is substantive or symbolic, how causality is established, who benefits or loses, and how the transfer is translated into the local context (Steiner-Khamsi, 2016a). Two important epistemological perspectives are associated with these distinct, almost opposing, approaches. On the one hand, the normative/ applied approach is very much constructed within the pursuit of 'evidence-based policymaking' that is closely related to the idea of 'rationality' (Sanderson, 2002). Proponents of this perspective argue that policymakers take 'rational' decisions, based on scientific evidence, to emulate 'global best practices' and that these measures produce more efficient and effective policy outcomes than the alternatives (Cairney, 2016). On the other hand, the interpretive approach is analytical and seeks to understand the process of transfer itself. The next section elaborates on this latter analytical perspective.

2.2 Analytical Models of Educational Transfer

Rejecting the standpoints of World Culture, World Systems, and the normative approach of rational policymaking theorists, contemporary CE scholars, often identified as 'culturists' (Portnoi, 2016; Silova, 2012), argue that 'policy borrowing and lending has more to do with what is occurring in the local context, than with best practices, or effective policies, that await transfer from somewhere else' (Steiner-Khamsi, 2012, p. 15). From this perspective, a number of models have emerged to interpret and analyse policy borrowing and, in what follows, I offer a critical review of them. Below I argue that these models have limited explanatory value for understanding the borrowing practices observed in the Gulf. See Table 2-2 for a summary of this argument.

Based on their study of English interest in German education systems over time, Phillips and Ochs developed two analytical frameworks, commonly known as the Oxford Models, to analyse the process of cross-national attraction in education. The first is a structural typology of the focus points within an education system that might have externalisation potential (Ochs and Phillips, 2002). The second is a conceptual framework; the most comprehensive of the models, it builds on the typology of foci points and maps the stages of cross-national policy attraction (Phillips and Ochs, 2003). Phillips and Ochs focus on the initial phase, where a country develops an impulse to look elsewhere for policy solutions. They also identify a continuum of educational transfer (Ochs and Phillips, 2004). At one end, the transfer could be imposed - for example, it could emerge under authoritarian or colonial rule, or as a condition to receiving aid. At the other end, transfer might be initiated voluntarily.

These models have been helpful in introducing fundamental features and functions to explain substantive forms of borrowing between nation states. However, they were developed based on an analysis of historical examples and do not account for contemporary developments, such as the increasing role played by international agencies and education businesses under systems of global governance that have redefined the traditional role of the state in policymaking. Ball (2007) has argued that ‘statework’ in education has been exported to the private sector, which is now operating inside government (Ball, 2009). Policy borrowing has shifted away from referencing other nations to referencing what Rizvi (2006) terms ‘global imaginaries’ such as 'best global practices’ and ‘world class schools’. As Steiner-Khamsi points out, ‘in most cases the act of policy borrowing is de-territorialized and draws on broadly defined international standards or “best practices”’ (2014, p. 153). These

observations are especially relevant to the Gulf where the reforms have been largely led by the non-state actors advocating the transfer of '*international* best practices'.

In addition, the region does not fit neatly into the continuum developed by Phillips and Ochs that differentiate types of policy borrowing (e.g. coercive or voluntary). In Chapter 6, I will show with detailed examples from the Gulf that its key features suggest a hybrid model: despite the apparent voluntary initiation of and intent to reform by the state, non-state actors dominate the process just as in coercive policy transfer situations often associated with poorer nations dependent on external aid (Auld, Rappleye and Morris, 2019; Steiner-Khamsi, 2006).

Schriewer (1988; 2000) uses the concept of 'externalisation', a notion drawn from Luhmann's (1990) theory of self-referential systems, and argues that references to foreign systems or the world situation involve the discursive interpretation of international phenomena for the purpose of the ideological legitimation of a domestic policy and do not signal the substantive 'adoption' of an external influence. Schriewer and Martinez (2004) argue that the prevailing 'socio-logic' at home - a logic used repeatedly to select from the external environment so as to reinforce the logic at home - is the best predictor of international referencing. Consequently, they argue that no substantive borrowing or adoption of external influences occurs. This scenario is contrary to that in the Gulf.

Rappleye (2006; 2012b) builds on the externalisation thesis by emphasising the importance of local politics. He argues that the most important factor in interpreting the process of educational transfer lies within the contexts of the borrower. Based on his research on Chinese and American attraction to Japanese education, he produced a conceptual map of the context of cross-national attraction that moves away from analysing the content of transfer to its context, and pays more

attention to agency and the proliferation of new actors whilst reflecting the increasing complexity and subtlety of foreign influences (Rappleye, 2006, p. 226). The conceptual map introduces human impulses, in addition to the structural impulses in the Philips and Ochs framework, to overcome limitations related to agency beyond the nation state. These human impulses are classified as reform actors advocating or resisting change. Rappleye suggests that attraction ends up in borrowing when both the advocating and resisting actors use similar examples, and describes it as 'tactical manoeuvres in the "edu-political" chess match' (Rappleye, 2006, p. 238). The key point Rappleye makes is that discussions about policy transfer arise from pre-existing reform debates and the constellation of domestic actors and competing agendas. In a later article, Rappleye (2012b) develops the 'Political Production Model' which shows how discussions on education reform are staged and consciously use external references to legitimise policies internally. He also argues that no substantive borrowing takes place and changes derive primarily from the 'socio-logic' of the domestic system, reflecting Schriewer and Martinez's argument that references to elsewhere are selected to reinforce the logic at home.

In a similar vein, Steiner-Khamsi (2004; 2006) employs the concept of externalisation to argue that borrowing provides a political coalition-building strategy and the opportunity to mobilise resources in poorer nations. Overall, her findings echo those of previous models:

> Policy borrowing is never wholesale, but always selective and, by implication, reflects the 'sociologic' or context-specific reasons for receptiveness (Steiner-Khamsi, 2016a, p. 383).

A similar argument was previously made by Phillips in his overview of studies on policy attraction in education where, with a few exceptions, 'wholesale adoption of foreign models in education does not often happen' (2006, p. 556). Such claims do

not explain the wholesale and substantive transfer observed in the Gulf.

Whilst there is a growing number of studies focusing on transfer in non-Western settings, most of the analytical devices found in the contemporary literature on policy borrowing have focused mainly on the West. The recent consistent top performance of the 'Asian Tigers' on international educational league tables has turned attention to the Far East as 'reference societies' (Sellar and Lingard, 2013; Waldow, Takayama and Sung, 2014); few studies look at transfer in developing countries, where borrowing is seen as a tool for resource mobilisation or a condition for receiving aid. Scholars of policy transfer tend to draw from instances in 'the First World to make generalisations about policy borrowing and lending in the rest of the world' (Steiner-Khamsi, 2006, p. 675). Despite the intensive transfer occurring in the Gulf, most of the literature has focussed on the Higher Education sector, rather than the K-12 sector.

Model	Description	Limitations
Cross-national attraction (Phillips & Ochs, 2002, 2003, 2004)	An analytical framework to analyse the process of transfer based on a structural typology of the focus points of an education system that might have externalisation potential and the impulse for interest in foreign policies and potential for transfer in addition to a continuum of educational transfer in which educational borrowing might be conceived.	• Focus on what is being transferred 'content' and the process of transfer, but very little on why • Contextual factors are not clearly considered in this model • Takes the nation state as the inherent agency of transfer, thus not accounting for the complexities of the global governance and non-state actors. • The transfer continuum is limiting, forces us to think about a category and analyse it accordingly, in fact they state their model works best for voluntary instances of transfer.
Externalization Thesis (Schriewer & Martinez, 2004)	Based on Luhmann's systems theory, the externalisation thesis argues that the 'socio-logic' at home (internal factors) are a better predictor for international referencing	• Not clear how this model works when non-state actors are playing a significant role in the transfer process, confusing whose socio logic applies to the practice of referencing. • This thesis suggests borrowing is often symbolic and does not resemble original practices after contextualisation.
The political production model Rappleye (2006, 2012)	Reimagines educational transfer as a theatrical play to legitimise home developed reforms and build coalition between different stakeholders	• The political context in the Gulf is different, it is highly centralised, and thus there are no resistance actors. • The model suggests that borrowing is symbolic or a political act
The politics and economics of educational borrowing and lending Steiner-Khamsi (2004, 2006, 2009)	Extend the empirical examples to include developing countries using the externalisation thesis as an interpretive framework for the systematic analysis of policy borrowing and lending Explore local policy contexts to understand why externalisation occurs and when the policy window opens. Argues policy borrowing and lending are tools of coalition-building (politics) or resource mobilization (Economics).	• Emphasis on the local context but empirical cases present different features to those observed in the Gulf • Suggesting policy borrowing is never wholesale does not explain the reforms in the Gulf • Transfer and references to elsewhere are not a result of aid conditions or a coalition building strategy

Table 2-2 Comparison of analytical devices

Two implications from the review of the analytical models appear to be especially relevant to the Gulf. Firstly, the existing portrayals of policy borrowing as a symbolic, discursive and legitimatory exercise designed to harness support and create coalitions in contested political environments do not apply to the Gulf. Public contestation over reforms and the legitimisation of existing political agendas are not features of policymaking in the Gulf's highly centralised political system, as will be seen in Chapter 5. The form of policy borrowing that takes place is substantive, and the largely uncontested attempts to improve the quality of education were initially well received by the local media and the various stakeholders. As I will demonstrate, the domestic 'socio-logic' of the Gulf seems to have involved the transfer and wholesale adoption of the logic of the GEI. Secondly, notwithstanding the Gulf's apparent voluntary initiation and intent to reform by the state, non-state actors dominate the process just as in coercive policy transfer situations often associated with poorer nations dependent on external aid. This confirms Dolowitz and Marsh's (2000) claim that the role of consultants in policy transfer complicates the categorisation between coercive and voluntary transfer:

> The role of international consultants makes less clear the distinction between voluntary and coercive transfer. For example, while consultants may 'force' a uniform model of market reform upon developing nations, if they are hired by a government, either as the agent of an international aid agency or 'independently,' such a situation clearly has elements of both voluntary and coercive transfer. (p. 11)

2.3 Literature From and About the Gulf

Whilst there is considerable research on policy borrowing in comparative education, and on transfer in political sciences, focusing on empirical examples from developed countries and increasingly developing countries, the research covering the Gulf has focussed on the higher education sector. A search for the academic literature emerging from the region and its approach to educational policymaking and reforms at the K-12 level returns limited results, and in most of these, authors assert that the region is under-researched (Abi-Mershed, 2010; Mazawi and Sultana, 2010).

Filling the void, and perhaps seizing the opportunity, global think tanks, international organisations and consultancies have saturated the region with what has been described as a 'grey literature'. This section begins with a review of the academic literature concerned with the analysis of the Gulf's educational reforms especially in the K-12 levels. I go further to review the studies that analyse the approach to reforms in higher education as scholars in this area have produced critical analyses of the impact of globalisation on higher education in the region. The review of this body of literature illustrates the dearth of critical analyses particularly in addressing the central role of the GEI in advancing a contemporary form of policy borrowing that is distinctive from the forms discussed in the previous section. I then focus on the grey literature to argue that the content and structure of this literature frames both the nature of the policy problem and the solution in wholly economic terms.

K-12 Education Reforms

Practices of borrowing and transfer have underpinned the development of education in the Gulf since the introduction of formal education in the mid-20th century.

Ministries of education at the time lifted curricula from neighbouring Arab countries and relied on Arab teachers and specialists (Davidson, 2010; Ridge *et al.*, 2014). After the Gulf States' political independence, which coincided with the materialisation of oil wealth in the late 1960s and early 1970s, borrowing extended beyond other Arab nations and primarily took the form of international partnerships with regional and international organisations. The beginning of the 21st century, however, saw a period of ambitious reforms that overhauled the education systems in all of the Gulf States; much of the approach depended on emulating 'global best practices' and features of 'top performing systems'. It can be argued that the approach of the Gulf States is the modern equivalent of the Japanese Meiji reforms, yet it is surprising that the approach of these states to educational reform has not been picked up in academic debates in CE and PS, besides a few studies which I review below.

Philips and Ochs (2004) maintain that the research on policy borrowing falls under three broad themes: questions of definition (determining the parameters), analysis (identifying the processes) and assessment (judging the outcomes). Academic scholarship on approach in the Gulf is either concerned with the theme of assessment or adopts a normative policy analysis approach to understand what can be learned from other systems. There is a clear recognition of the 'borrowing' aspect in reforms in the region. For example, Shaw (2006, p. 46) claims that:

> There are many, and successful, ad hoc borrowings, but a really localised. Authentic solution is still some way in the future. Expatriates still predominate amongst schools inspectorate. Although affluence can buy good buildings and textbooks, it cannot always buy administrative skills, high quality training, appropriate supervision nor commitment to effectiveness.

In addition, the tenor of the literature about the K-12 reforms in the Gulf, is that they to date have had no or very limited impact. For example, a paper published in 2015 following the World Innovation Summit for Education (WISE) stated:

> Over the past decade and a half, key countries of the Gulf … have invested considerable resources in education. Driven by a desire to better prepare their economies and societies for an increasingly globalised and competitive world, these countries adopted ambitious and comprehensive education reform agendas … And yet despite the availability of ample financial resources and expert policy and management advice, most independent reviewers have concluded that the actual results have fallen short of initial expectations. (Alfadala, 2015, p. 4)

And the reasons were:

> Most, if not all, of these outcomes were found to stem from a single, underlying response to the reforms being introduced: resistance to the change. (ibid, p.7)

Alkhater (2016) argues that the borrowed reforms in Qatar stemmed from a genuine need to reform but were undermined as the local context played a significant role in impeding their implementation. Similarly, in their edited book dedicated to understanding the challenges of educational reforms in the Gulf, Wiseman, Alromi and Alshumrani (2014) argue that many obstacles stand in the way of implementing reform:

> The challenges to creating an Arabian Gulf knowledge economy are twofold. One is a functional and structural challenge of developing a knowledge economy-oriented mass education system. The other is a cultural and contextual challenge of aligning Arabian Gulf expectations, traditions, and norms with institutionalized expectations for knowledge economies. (Wiseman, Alromi and Alshumrani, 2014, pp. 2-3)

Hayes (2017) looked specifically at the policymaking process in Bahrain to assess the implementation of reforms, and argued that the local policy process was incompatible with the borrowed practices, thus affecting the success of the transfer. Kirk (2014) on the other hand argues that the reform in Bahrain was ‘too fast, too foreign’, where transfer and replication were made without careful contextualization,

resulting in a failure to reform:

> Broader structural deficiencies within national governments, a reliance of replication rather than innovation, the borrowing of foreign models and expertise and an acceptance of the status quo all seem to stunt any real and dynamic educational reform in the Gulf States (Kirk, 2015, p. 92)

Donn and Al Manthri (2013) explore educational borrowing in the Middle East by focusing on the content of transfer, which they portray as a 'baroque arsenal'[4] that ultimately leads to failure. Overall, the analysis of this literature reveals that while the centrality of transfer is recognised, its 'process' is rarely analysed and the role of the GEI and its modus operandi is not explored in depth.

Higher Education Reforms

Whilst the studies on the K-12 reforms in the region mainly focussed on the 'outcomes' of the reforms, studies of higher education reforms in the Gulf in particular have drawn more attention to the 'processes' of and influences on reforms resulting from the influence of globalisation. At the turn of the century, the higher education sector in the Gulf witnessed profound changes characterised by the exponential growth in the number of higher education institutions, a dependence on private sector institutions to provide education that meets the needs of the market, and the unquestioned dominance of the American university model (Coffman, 2003). Al-Khalifa (2016) attributes the increase in the number of international branch campuses and private higher education institutions in the Arab Gulf in general to the

[4] This was a concept developed by Kaldor (1981) to study the involution of innovation to understand the production of weapons in which more investment produces less impact. Donn and Al Manthri apply the concept to educational products transported around the globe and argue that they are out-dated by the time they travel.

change in international rules on trade in services, which were introduced by the World Trade Organisation (WTO) and the General Agreement on Trade in Services (GATS) since 1995. Dakhli and Zohairy (2013) also identify the move towards a service-based economy as a main 'push' factor in addition to the increased appeal of Western-based education, the rise of English language instruction and deregulation. The emerging education cities like Qatar's Education City, established in 1995 under the Qatar Foundation, housing 9 branches of internationally recognised universities such as: Carnegie Mellon University, Georgetown University, Northwestern University, Texas A&M University, University College London, Virginia Commonwealth University and Weill Cornell Medical College (Qatar Foundation, 2019), and Dubai's International Academic City, established in 2007, and housing more than 23 international branch campuses (Gulf News, 2017), are clear examples of the changes in the higher education sector in the region. In their analysis of these specialised cities in the Gulf region, Khodr and Reiche (2012) identify the centrality of policy transfer and diffusion.

Donn & Al Manthri (2010) analyse the forces of globalisation on higher education critically using the case of higher education reforms in Oman. They demonstrate the clear links to the labour market needs, which they term as 'material' forces, and the intensive borrowing of global best practices, which arguably goes beyond policy borrowing and describe them as 'cultural replacement' (ibid, p. 24). They recognise that most of the reference societies that the Gulf countries chose to borrow from have established best practices that originated from a very different cultural and political setting, and explore an alternative approach to borrowing by analysing the Finnish example and highlighting its success as a 'home grown solution'.

However, and more importantly, they extend their analysis beyond the 'material' forces and draw attention to the role of soft global governance in shaping the regional higher education policy directions. The authors argue that these 'rhetorical' forces are advanced by a 'magistracy' of non-state actors that include members of the GEI, illustrated in the role of the G8 in the Broader Middle East and North African Countries. This has resulted in a standardised model of higher education in the region that focuses on the financial interests of the labour market and is heavily dependent on borrowing a 'Baroque Arsenal'; this means that the Gulf States are paying for outdated products mainly from Western countries and in doing so they are not investing money in generating knowledge or creating their own Innovation.

Overall, the authors view the developments in higher education as problematic because it reinforces the peripheral status of the Gulf States (Altbach, 2006). The unintended consequence is that the quest to create a knowledge-based economy is undermined as the knowledge is not locally generated. In addition the seller countries are benefiting financially but more importantly, as they are selling outdated products, they create more room for innovation and creation of knowledge in seller countries (Centre countries), which creates a negative effect on the purchasing country (Periphery countries)' (ibid. p. 160).

Miller-Idriss and Hanauer (2011) argue that there is a striking similarity in the approach amongst the six Gulf countries in their approach to higher educational reforms. Reviewing the contemporary theoretical perspectives on educational transfer, they conclude these do not adequately apply to the approaches in the Gulf:

> We argue that neither neo-institutional theories about global norm diffusion nor culturalist theories about the local politics of educational borrowing and transfer sufficiently explain this phenomenon, and call instead for a regional approach. (Miller-Idriss and Hanauer, 2011, p. 181)

Similarly, Phan (2010) argues that the prevailing theoretical/ political explanations for borrowing are inadequate for the Gulf, claiming instead that a new paradigm of educational transfer is emerging in the Gulf. Using the Qatari higher education reforms as a case study he states:

> In contemporary educational transfer projects in the Arab Gulf states today, that historical power dynamic has been turned on its head, and the relationship between borrower and lender can be characterized instead as one of patron and client. Today, the borrowing Arab host country (or organization or individual) wields preponderant economic and political power as the local sponsor of educational products, services, and/or expertise. (Phan, 2010, para. 4)

He also claims that the power shift allows the host country to control the financial terms and conditions, therefore:

> The traditional view of 'granting' a Western education is not really applicable in a part of the world that is economically able to choose, buy, and import educational products and services (ibid, para. 5).

The literature on higher education reforms advances the theoretical discussion and analyses the 'process' of reform more critically by recognising the influence of globalisation and the role of non-state actors, however, it does not analyse *how and why* GEI actors, specifically private sector consultants, operate in the Gulf. This reflects two key differences between the K-12 sector and the higher education system. Firstly the higher education sector is more directly influenced by the forces of Globalisation than the K-12 sector (Shields, 2013). This is because, inter alia, the K-12 sector is designed for all citizens and expected to more closely reflect and transmit local cultural and social values. Secondly, in the higher education sector reforms tend to be enacted by a combination of the state and the individual higher education institutions who are expected to improve their global status and often work in collaboration with other internationally recognised higher education institutions to do so. The private sector is involved but this tends to be as a direct provider of higher

education. This approach resembles the earlier forms of privatisation in education identified by Ball (2007) which he argues are centered on 'hard' services, i.e. private schooling, text book production and school building constructions, albeit under the strong control of the state. In contrast the reforms of the K-12 education sector is characterised, as illustrated in this thesis, by the heavy involvement at all stages of the policymaking process by the GEI and the focus on the system rather than individual institutions. This resembles the 'new' form of privatisation which Ball (2009) refers to as the privatisation of 'state work'. I elaborate on the different types of privatisation in the next section. This difference is well illustrated in Bahrain where the University made significant reforms as it sought to improve its global standing but the involvement in this process of the GEI was minimal. Their involvement was mainly through outsourcing services and providing technical advice (e.g. IT systems). The one area of higher education where the GEI was more directly involved throughout the policymaking process was with regard to the Bahrain Teachers College and this was a direct consequence of its role as a provider of teachers to the K-12 education sector. The focus of this thesis is on analysing the role of the GEI in the reforms at the K-12 level. There has been relatively little analysis of the transactional/ commercial form of policy borrowing/ transfer that dominates the attempts to reform K-12 education in the Gulf.

Grey Literature

On the other hand, there is ample grey literature which include reports published by governments, International Organisations, think tanks and consultancy firms operating in the region - focusing on education using a policy analysis approach. The United Nation Development Programme (UNDP) Arab Human Development report

(AHDR) series (2002-2016) (UNDP, 2002; 2003; 2004; 2005; 2009; 2016) and the World Bank's flagship report titled *The Road Not Travelled: Education Reform in the Middle East and North Africa (MENA)* (World Bank, 2008) remains influential in informing educational policymaking and is highly cited in the academic literature. These publications portray the issues of the education systems in the region with reference to its quality, and claim that this quality is unsuited for the 21st century; these reports rely on international comparative data sets such as performance on international student assessments to substantiate their arguments. The publications offer reform recommendations based on their analyses and much of these provided the basis of future educational reforms in the region:

> Much debate and widespread criticism about education systems of MENA countries have followed the publication of the AHDR series between 2002 and 2006 by the UNDP, and the World Bank's MENA development report of 2008 entitled The Road Not Travelled: Education Reform in the MENA (Rohde and Alayan, 2012, p. 1)

Such reports also had a noticeable impact in renewing and increasing interest in educational reforms in the region (Abi-Mershed, 2010). Consequently, much of the research focusing on the Gulf reflects the international organisations' discourse of 'quality' and investment in 'human capital'. These messages have been manifested in some academic publications calling for the 'kind of education needed' (ECSSR, 1999) in which education goals and benefits are presented almost wholly in economic terms.

Along the same lines, think tanks and consultancy firms operating in the region publish voluntary 'policy analysis' reports, or commissioned reform proposals and evaluation reports, all carrying the same messages around the poor quality of the education system and unsuitability for the 21st century and economic competitiveness. I analyse these reports in more depth in Chapter 4. As will be seen,

my review of the former reveals that in these documents, the local context is presented in economic terms. Moreover, the policy analyses in these reports follow the positivistic and hyper-rational approach outlined above.

What is intriguingly missing from both bodies of literature are the analytical questions as to why the Gulf uses educational transfer as a reform strategy, and how policy transfer occurs. The review of the literature from and about the Gulf reveals a number of gaps. First, policy borrowing in the Gulf goes beyond merely looking elsewhere for specific policy practices that can be transferred or referenced: the Gulf education systems appear to borrow wholesale processes, policies, institutions as well as personnel. Second, the reforms have not delivered the desired outcomes and failure is attributed to local reasons such as resistance to change and local functional and structural deficiencies. Third, although a few studies attempt to analyse the approach to educational reforms itself, most merely attempt to assess the outcomes. Finally, management consultants appear to play a significant role in advocating transfer, yet their role is not explored in academic research. Thus, in what follows, I will focus on the GEI and their role in educational policymaking, with particular attention to the research on management consultants.

2.4 The Global Education Industry

Given the central role played by non-state actors in educational reforms in the Gulf over the last two decades, it is imperative to explore the literature that analyses their role in this. Whilst the CE literature recognises their increasing influence, the area remains largely under-researched (Steiner-Khamsi, 2016a). Similarly, Holden (2009) argues that, in particular, little attention has been paid to the role of commercial interests in the transfer of policy. In this section I review the literature concerned

with the proliferation of non-state actors in education, i.e. the 'privatisation' of education and the emerging role of the GEI; I then broaden the review to examine the literature concerned with the role of non-state actors in public policymaking in general, with a particular focus on the role of management consultants given their extensive role in the Gulf.

Privatisation in Education and the GEI

Privatisation in education is not a new phenomenon; the term 'privatisation' refers in general to the transfer of public responsibilities to the private sector. Feigenbaum and Henig (1997, p. 338) define it as 'any initiative that increases the role of the market in areas previously considered the province of the state'. The origins of privatisation in education have been traced back to the 1970s. Ball (2007) argues that the entry of non-state actors into the education sector was a consequence of the neoliberal reforms of the state. At that time, there was also an increasing belief that the welfare state model was a drain on the wealth of the state and a 'free market' approach would be more effective (ibid). The subsequent drive to reduce the size of the public sector in many countries opened avenues for the private sector to offer a wide range of services previously provided by the state. Earlier privatisation in education centred on what Ball (2007) termed as 'hard' services, i.e. private schooling, text book production and school building constructions, albeit under the strong control of the state. As Ball argues, this form of privatisation in education 'is old but also very new' (ibid, p.13), where the 'old' refers to the provision of hard services listed above. The unparalleled growth of privatisation in education over the past three decades and its increased influence on educational policymaking constitutes the new. Today, there are no areas exempt from private sector participation.

The growing influence of global governance systems in education, the forces of economic globalisation, the financialisation of education, the adoption of global educational policies (such as accountability and curricular standards) facilitated the conception of education as a sector for investment and profit making (Lubienski, Steiner-Khamsi and Verger, 2016). Education is a big business: the GEI as a whole is estimated to be worth more than USD 4.4 trillion and that is growing (Strauss, 2013). Within that, educational policy itself has become a massive opportunity for profit making. This contemporary development has been defined as

> [A]n increasingly globalised economic sector in which a broad range of educational services and goods are produced, exchanged and consumed, often on a for-profit basis (Lubienski, Steiner-Khamsi and Verger, 2016, p. 4).

Whilst there is a great deal of writing on the privatisation of education, the research on understanding the processes by which education markets are produced and maintained is limited.

The GEI comprises a broad range of actors that includes education businesses, consultancy firms, philanthropic foundations, think tanks, advocacy networks, and individual policy entrepreneurs. These actors do not operate in an isolated manner: they depend on a broad range of other actors including governments, and regional and international organisations (Lubienski, Steiner-Khamsi and Verger, 2016). Together they have formed what are referred to as Transnational Advocacy Networks (TANs) which have grown rapidly since the start of the 21st Century (Ball, 2012). The role of the different actors has been analysed by scholars, including the role of consultancy firms (Gunter, Hall and Mills, 2015), philanthropies (Au and Lubienski, 2016; Olmedo, 2016), education businesses (Riep, 2017); and Verger (2012) has analysed the central role of Public-Private Partnerships (PPPs).

Earlier studies referencing the GEI tended to use the concept narrowly to describe private schooling provision in developing countries (Tooley, 2001), or in reference to education technology (OECD, 2018a). However, the activities of the GEI are now unlimited and cover a broad range of services and goods; they continue to find or create market niches and, more importantly, their activities evolve in a variety of ways in different territories and in relation to different markets (Verger, Steiner-Khamsi and Lubienski, 2017, p. 236).

Of particular relevance to this study is the increased role of the GEI in the politics of education. Indeed, private businesses have been colonising the formation of education policy itself. Companies produce policy texts and policy ideas for governments and – through their work as advisers, evaluators, service deliverers, philanthropists, researchers, reviewers, brokers, contract writers, partners, committee members, consultants and auditors – have become part of what has been called the 'policy creation community', operating, in effect, inside government (Ball, 2009).

As policymakers become reliant on scientific evidence in policymaking (Tröhler, 2015), the GEI actors have appropriated their expertise in producing scientific knowledge as a key strategy (Verger, Lubienski and Steiner-Khamsi, 2016). They market their expertise as providers of solutions, which are said to prevail in high-performing nations on international tests. Auld and Morris (2014; 2016) have identified the modus operandi of the GEI members and the strategies they employ to mask their inability to deal with the complexities of identifying causal connections in policy transfer between nations. Despite the dearth in academic research addressing the GEI, the topic is now gaining the interests of scholars who are analysing more critically the way in which the GEI is operating. For example, recently a dedicated issue of the journal of *Globalisation, Societies and Education*

focused on the market-making strategies of the GEI (Komljenovic and Lee Robertson, 2017).

The role and modus operandi of non-state actors in policy work has also been recognised in political science: Dolowitz and Marsh (2000) highlight policymakers' increasing reliance on the advice of consultants, especially in the Western contexts. In the next section, I focus on the literature that analyses the role of management consultants in public policy as well as education.

Literature on Management Consultants and Policy Work

Management consultants[5] have become key players in the process of policymaking and public sector reform over the last few decades (Saint-Martin, 2007). An extensive literature, mainly in Political Science, addresses the role of private sector consultants in politics. Researchers attempt to define and explain the nature of their role in policymaking. Their focus has primarily been on Western democratic contexts. Recently developing countries have gained researchers' interests, as a result of the growing role of consultants in these countries which arises from the conditions of loans provided by international financial institutions (Bock, 2014; Frenkel and Shenhav, 2012).

Definitions of management consultancy are problematic because the permeable boundaries of the industry have resulted in significant shifts over time with respect to its composition (Kipping and Clark, 2012). Despite this, management consultancy, at its heart, is an advisory activity built on the client-consultant relationship (ibid). The industry defines it thus:

> [A]dvisory and/or implementation services to the (senior) management of organisations with the aim of improving the effectiveness of their business

[5] Management consultants are also referred to as business consultants.

> strategy, organisational performance and operational processes. Management consulting is – due to the great diversity in disciplines and differences in required capacities of advisors – the broadest area within the consulting industry, and covers between 50% - 55% of the total consulting market. (Consultancy.uk, n.d., para. 1)

The growth of management consultancy in the public policy arena has stimulated research aiming to understand the reasons for this growth; both from the demand and the supply perspectives (Saint-Martin, 2012). The move in the 1960s from the Weberian model of bureaucracy to 'new managerialism', a term used to describe the group of ideas imported from business into government by management consultants, has been recognised as the period in which the increase started (Saint-Martin, 2004). The move from the Weberian model is also seen as a result of the consultants' involvement in politics (Byrkjeflot, 2018), especially through their role as purveyors of innovation, rationality and functionality (Kantola and Seeck, 2011).

Researchers identified 'rationality' as the main reason for the increase in 'demand' for consultants by governments (Saint-Martin, 2012). In recent decades, notions of good governance promote a rational approach to policy making. In the 1960s for instance, rational planning in politics claimed to make the management of the modern welfare state more 'scientific' and professional (Fischer, 1990). This was accompanied by an increase in demand for 'policy analyses'. The result was the opening up of a lucrative market for consultancies whose expertise have become valued by policymakers who see them as tool that assists the in overcoming bureaucratic resistance and mobilising support for the policy ideas that they' (Saint-Martin, 2004, p. 198). This phenomenon has been described as a process of legitimation, in which policy actors utilise the rational advice of consultants to legitimise policy agendas (Bock, 2014; Jones, 2018).

Page (2010) identified 4 types of expertise relevant in government for policymaking: (1) scientific expertise; (2) policy expertise; (3) process expertise; and (4) instrument expertise. Researchers, focusing mainly on Western contexts, claim that internal government policy experts are process experts, lacking the other type of expertise. This lack of in-house expertise provided the opportunity for external experts to enter the public policy arena (Howlett and Migone, 2013; Page and Jenkins, 2005). Haas (1992) describes the networks of knowledge-based experts as 'epistemic communities': he argues that they play a significant role in

> [A]rticulating the cause-and-effect relationships of complex problems, helping states identify their interests, framing the issues for collective debate, proposing specific policies, and identifying salient points for negotiation. (Haas, 1992, p. 2)

Consequently, these 'epistemic communities' have power in the diffusion of new ideas and data and in determining international policy coordination (ibid).

Another reason associated with the increase in demand for management consultants is that these consultants are portrayed to be objective and neutral external evaluators of government work (Speers, 2007). A corollary of this allegedly expert and rational angle is that consultants have become a useful tool in legitimising preferred policy options (Stone, 2004).

However, the role of consultants has been criticised in the academic literature. As Howlett and Migone (2013) put it:

> concern has arisen over the costs incurred by governments in this area and over the possible rise of a 'consultocracy' with the corresponding diminishment of democratic practices and public direction of policy and administrative development (Howlett and Migone, 2013, p. 241).

Research shows that often, consultants are used as tools in bureaucratic in-fighting over preferred courses of action and budgetary allocations (ibid), and Kantola and

Seeck (2011) demonstrate that the expert knowledge of consulting is adopted as a legitimising device for political elites as they justify their position in society.

Formally, the literature argues that governments are perceived to be creating the demand for consultancies; however, Saint-Martin (2012) argues that consultancies are businesses with an adaptable nature that has made them able to transform themselves to seize opportunities through 'supply' management strategies designed to ensure the survival and continuity of their business. The literature identifies two main strategies used by consultants in this area, first, utilising their ability to create new ideas for the public sector and, second, doing this through networks of advocacy.

In creating new ideas, management consultancies utilise marketing strategies in order to sell their services to governments. Dwyer and Harding (1996) argue that a favoured marketing tactic in the firms' attempt to increase their share in the market revolves around the dissemination of such ideas. These include producing books and policy analysis reports as well as the creation of research centres (ibid). This aspect has been illustrated in the increasing volume of 'grey literature' informing policy making (Davidson, 2017). The dissemination of such 'self-funded' analyses and reports often leads to governments hiring their services. A recent example of this was McKinsey's policy analysis report on Saudi Arabia (McKinsey & Co., 2015), which considerably influenced the Kingdom's Economic Vision 2030, which was launched a year later (CEDA, 2016).

The second strategy revolves around networking and lobbying (Saint-Martin, 2012). Howlett and Migone (2013) maintain that private sector consultants brought into government are part of a large 'policy advice system' in which government decision-makers sit at the centre. Stone (2001) argues that extensive networking is

used to diffuse ideas and cultivate links with international organisations. Stone (2004) also suggests that non-state actors alone cannot bring about policy transfer. Rather, they are dependent on these networks. In contrast, Ball (2012) argues that such 'policy networks' are shaping educational policy making.

Notwithstanding these networks and lobbying strategies used by consultants and other non-state actors to gain influence and subsequently business, in the Gulf, consultants have directly gained access through personal relationships with the monarchies. Saif (2016) demonstrated how consultants working in the region usually approach the heir apparent.

Consultants in Developing Countries

Although consultancies have dominated markets in the Global North, Curnow and Reuvid (2003) argue that these are mature markets, and that the 'rest of the world', including developing countries, is now the fastest growing consulting markets (ibid). Despite this, there has been little systematic academic research on the role of consultants in this emerging market (Frenkel and Shenhav, 2012).

Stone (2003) recognises the role of international organisations, such as the World Bank, in creating the demand for development knowledge which consultants are perceived to have. Bock (2014) notes how this demand usually comes in the form of conditionalities on aid, and that such conditions cannot be met by developing countries due to a lack of capacity and expertise. He argues that consultants have therefore become important interlocutors receiving substantial funding from developed countries (ibid). This has led, among other things, to a situation where developing countries readily hire global consultancies to signal to the donor community that they understand the importance of compliance with international

standards and market principles (Nesseth, 1999, cited in Bock, 2014). As with the concept of the advocacy networks, Stone (2000) argues that special global networks of consultants are lobbying in these countries.

The nature of the consultants' involvement in developing countries differs from their role in the Global North. Consultants in Western contexts are often brought in to work with government officials on a specific task that often serves to legitimise a pre-existing policy agenda. However, due to the perceived lack of local capacity in developing contexts, consultants are often invited to assume a more comprehensive role that results in a wholesale approach. This often leads to the creation of parallel state structures that are run by external experts effectively operating as a 'shadow' government entity (Winther-Schmidt, 2011).

Consultants in the Gulf

In the Gulf States, management consultants have a particularly strong foothold, and their market size has been growing rapidly (Bianchi, 2016). As noted earlier in their quest to modernise rapidly, Gulf governments have relied heavily on consultants to a point where they have become entrenched in the government. Saif (2016) points to how locals refer to the Ministry of Planning as 'Ministry of McKinsey' in Saudi Arabia; similarly, recent cabinet reshuffles based on McKinsey reports in Saudi Arabia were dubbed the 'McKinsey Reshuffle' (Abdel Ghafar, 2016). Yet despite the consultants' extensive role, very little research has explored their involvement in the region. Much of the literature about the Gulf simply recognises the centrality of their role (Hanieh, 2018). A recent study, seeking to understand the nature of consultancy in the Gulf, focuses merely on the hypothesis that consultants rationalise governance and that they imbue legitimacy to them (Jones, 2018), and it does not explore their

modus operandi.

Summary

The particular political system that shapes policymaking in the Gulf creates a distinct environment for the work of consultants in the region, and this is not explained by the existing research focusing on the Global North or on developing countries. Table 2-3 below, summarises the key differences in the nature of the consultancy work based on the literature analysed above.

	Western countries	Developing countries	Gulf countries
Nature of involvement	Working **with** the government to provide a **specific** type of scientific or technical expertise	**Replace** government and provide all types of expertise: scientific expertise, process expertise, policy expertise and instrument expertise	**Hybrid** model in which they appear to be working with the government but often replace existing entities
	Their expertise is described as neutral, objective, efficient and rational	Their expertise is described as politicised but also efficient and rational	Their expertise is described as rational
	Often used to legitimise existing political agendas	Often used to deliver services as part of a condition for receiving aid	Often used to design, deliver and evaluate policies
Initiation type	Voluntary	Coercive	Voluntary
Scope of work	Selective/ focused	Wholesale	Wholesale

Table 2-3 Nature of consultants involvement in policy work

The Table illustrates that management consultancy in the region, like borrowing/ transfer types (Ochs and Phillips, 2004; Dolowitz and Marsh, 2000), presents mixed features and results in a hybrid model which combines features of the work of consultants in the West and developing countries. In the Gulf, consultants are invited voluntarily to provide expertise on modernisation reforms using their scientific and rational evidence-based advice on policy matters, yet the nature of their involvement is similar to the wholesale approach observed in poorer nations.

Chapter 3 **Methodology**

Punch and Oancea (2014, p. 19) identify two approaches to research planning, a *paradigm-driven approach* and a *question-driven approach*. The former begins with an articulation of the paradigm (research traditions associated with assumptions about the nature of reality and the appropriate ways of building knowledge), then develop research questions and methods from it. The latter begins with a research question that needs an answer and then appropriate methods are chosen. Punch and Oancea further argue that the first approach receives more attention as many universities insist 'that research should not be allowed to proceed until it has articulated its paradigm position', whilst in reality, researchers often start with questions that are influenced by what they have read or by their own professional experience (ibid, p. 28).

I have found that the *question-driven approach* resonates more closely with the logic through which my research design emerged, and I present this chapter accordingly. In the first section, I recount my previous professional experience and how it influenced the research topic; this is followed by a discussion about my position as a researcher. In the second section, I present the research design. This outlines the levels of analysis in this study and the corresponding research questions, focusing on why these questions were chosen and how they relate to one another. The third section reflects on the first two sections and presents resulting philosophical perspectives. The fourth section discusses the methods of data collection and analysis used in this study. Finally, in Section Five, I reflect on the challenges I encountered in conducting this study and the ethical considerations I have made.

3.1 Developing the Research Focus

I started my first job in 2004, soon after I completed my undergraduate studies. I spent the following 11 years working initially on the implementation of the national educational reforms in Bahrain and then on policy analysis. Over the years, I changed roles from a Specialist in an MOE school training teachers on Information Technology skills in education, to a senior associate at the EDB working alongside a team of McKinsey consultants and the local policy elite. In the latter role, I was involved in 'diagnosing' the Bahraini education system, conducting benchmarking trips to countries with top performing education systems, researching international educational best practices, developing reform strategies accordingly, and managing contracts with international partners selected to deliver these reform strategies. Finally, in 2009, I moved to the Bahrain Teachers College (BTC), as a Director of Corporate and Strategic Planning. The BTC was one of the reform initiatives introduced by the EDB and McKinsey during the first wave of reforms and this executive role was an opportunity for me to enact and manage the evidence-based reform strategy I had been involved in developing. Over time, therefore, I progressed in my career along the stages of the 'policy cycle'[6] and my exit from this 'policy cycle' coincided with my entry into academia when I started this doctoral study at the UCL Institute of Education in 2015.

Influenced by my professional experience, I started my PhD with the aim of understanding the issues and barriers affecting the implementation of the reforms.

[6] The policy cycle divides the policy process into a series of stages, from a notional starting point at which policymakers begin to think about a policy problem to a notional end point at which a policy has been implemented and policymakers think about how successful it has been before deciding what to do next (Cairney, 2011, p. 32).

The last position I held in my career journey was a frustrating one: I found myself implementing the internationally benchmarked evidence-based policies I once advocated. Ideally, successful implementation should have been the logical next step. However, the reality was far from that. I witnessed the failure to translate these policies into actions. I was so focused on implementation issues, that I never questioned the policy design. After all, these were the evidence-based policies that I was personally involved in researching and adapting to Bahrain's needs.

Soon after starting this study, I expanded my reading beyond the GEI's reports; and at that point I realised that policy implementation is intertwined with the policy design, and that issues underlying implementation should be investigated at the design phase as well as the implementation phase. Consequently, my focus shifted towards an analysis of the approach to how the reforms were designed, and why. In other words, an analysis of my previous work, which by extension is an analysis of the approach to reforms in Bahrain and the *modus operandi* of the GEI. It also became clear that as I exited the 'policy cycle', I shifted my philosophical perspective. Both the change in my focus and the resulting shift in perspective had critical implications for the methodological approach of this study. In what follows, I illustrate the development of the research questions and discuss the shift in perspective and its implication for my methodology. Before that, I discuss my positionality as an 'insider' researcher.

3.2 Insider Position

In social sciences, insider research is defined as one that 'is undertaken by members of the same group, who supposedly share one or a number of characteristics (cultural, biological, linguistic, political, occupational and so on)' (Loxley and Seery,

2008, p. 16). Thus, an 'insider' is an individual who possesses *a priori* intimate knowledge of the community and its members (Merton, 1972). Greene (2014) argues that Merton's definition suggests that the researcher is not necessarily a member of the group being researched, but could be a non-member with extensive knowledge of the group. Furthermore, it has been argued that the researcher's position is complicated by blurred boundaries that defy the simple juxtapositions of the either an 'insider' or an 'outsider' (Arthur, Crossley and McNess, 2016); hence, as Merton (1972) maintains, we are all both insiders and outsiders.

These definitions have three implications for my positionality as it is determined by where one stands in relation to others and its shifting nature during the process of conducting the research. My previous professional roles make me *occupationally* part of the community that I am researching, as I have been involved directly in educational policy design and implementation. As a Bahraini, I am also *culturally* part of the community I am undertaking this research on (and by extension the Gulf societies, given their shared commonalities). In these two cases, I can be considered as an *indigenous-insider*, defined as an

> individual that endorses the unique values, perspectives, behaviours, beliefs, and knowledge of his or her indigenous community and culture and is perceived by people within the community as a legitimate community member who can speak with authority about it (Banks, 1998, p. 8).

However, as I was never formally employed by the GEI, my close interaction and engagement with it gives me a form of an *external-insider* position, which is defined as an

> individual who socialized within another culture and acquires its beliefs, values, behaviours, attitudes, and knowledge … the *external-insider* is viewed by the new community as an "adopted" insider (ibid, p. 8).

And although the first two criteria position me on the 'inside', my role shifted when I

started this research and I stepped away from both communities, making me now an *outsider* reflecting on previous experiences.

Although researchers claim that neither the insider nor the outsider has a 'monopoly on advantage or objectivity' (Chavez, 2008, p. 476; Merton, 1972), my insider position in this study provides me with a number of advantages. First, I have a better starting position, having no need to orient myself with the research environment or participants: my pre-existing knowledge of the region's context and familiarity with the GEI have been a great advantage. Researchers interested in the GEI have often noted the secretive nature of their work, particularly consultants (Bock, 2014; Saint-Martin, 2012) but this was not an obstacle given my insider position. Second, research that involves politicians and senior civil servants, also known as 'elite research', often invokes a shift in power where the researched holds more power than the researcher (Ball, 2005; Walford, 2012). This presents researchers with issues of access to research sites and respondents, and raises questions as to the interview techniques that are needed, the interpretation of the data generated, and other ethical issues (Walford, 2012). In my case, the interaction with and access to this group was easier to manage because of my 'insider' position, albeit raising some ethical issues that I address in a later section.

These advantages, however, do not eliminate the challenges associated with insider positionality. Subjectivity and bias have been identified as core disadvantages associated with this, and with the qualitative approach in general (Lincoln and Guba, 1984). Aguilar (1981) argues that critics of insider research have characterised the prior knowledge of an insider as 'mere subjective involvement' and a 'deterrent to objective perception and analysis'. Moreover, as the researcher is considered too close to the study, it also raises questions about inherent bias. Greene (2014)

maintains that, in insider research, bias 'refers to the process whereby the researcher's personal beliefs, experiences, and values influence the study methodology, design, and/or results' although, as Aguilar (1981, p. 26) argues, that bias must not be feared as for the insiders this could be a source of insight as well as error. In addition to subjectivity and bias, my insider positionality poses a number of issues in relation to the ethical aspects of the research. In this study, I was fully aware of these issues and have addressed them in section 5 below, where I discuss research quality and ethical considerations.

3.3 Research Questions and Design

Research Questions

Having realised that the issues underpinning implementation of reforms in Bahrain could be a consequence of design, I focused my attention on the approach to reform and formulated questions to critically analyse this. In the early stages of my research there were only two research questions corresponding to two levels of analysis. The dearth of literature on the Gulf region, particularly around policymaking and educational reforms, necessitated introducing the first level which was aimed at identifying the critical features of the approach to educational reforms in the six Gulf States. The second level focused on the case of Bahrain's educational reforms to illustrate how and why the reforms were introduced and enacted. As I progressed, however, I realised that the contexts of educational policymaking in the region needed to be analysed as they played a key role in both policy making and the business model of the GEI. Thus, an overarching regional level of analysis was introduced, corresponding to the first research question below. Accordingly, the second research question become the third and changed focus to analyse reform

enactment in the Gulf, focusing on the case of Bahrain. Below, I briefly introduce the research questions, outlining why each question is important to this study, how it will be answered and how each question relates to the other questions.

RQ1: What are the 'contexts' of educational policymaking in the Gulf States?

Discussion of educational reform is an extension of the discussion about educational policy and practice. Therefore, an examination of the approach to educational reform requires an understanding of the local policy making context in which reforms are conceived. Such an understanding is necessary to illuminate the conditions encouraging educational policy borrowing and creating opportunities for actors beyond the state to be involved in policy work.

The inherent assumption, found in many doctoral studies, presumes that context is a neutral phenomenon which requires it merely to be described. A review of the prevailing literature in and about the Gulf, which is substantiated by the publications of the GEI, depicts a narrow view of the context, i.e. one that is wholly economic. Thus, reliance on this body of literature to provide the contextual background for this study confines interpretation within what the GEI deems as 'context', omitting or downplaying other important contextual factors such as history, politics and sociocultural factors. As a result, this research question was introduced to problematise the context(s) of education policymaking in the region and to demonstrate how its portrayal is both selective and central to the process of policy making. This level of analysis provided the foundation for the subsequent levels of analysis.

RQ2: What were the critical features of the approach to educational reforms in the Gulf over the last two decades?

A preliminary analysis of the reforms introduced in all six Gulf States reveals a large degree of commonality that produced a distinctive approach to educational reform in the region. Thus, the second question aims to identify, through a comparative analysis, primarily of the relevant GEI literature, the critical features of the approach to educational reform in the Gulf.

Whilst educational reform in the Gulf States has encompassed the whole education system from kindergarten to vocational and tertiary levels, I will focus my analysis on the K-12 level for three reasons. Firstly, concentrating on one level is manageable and realistic within my doctoral study timeline; secondly, access to K-12 reform policies and documents is easier because of my previous experience in that area; and thirdly, the approach to reforms of the vocational and tertiary levels is very similar to that of the K-12 level, and it can therefore be considered representative of the broader approach observed in the region.

RQ3: What were the outcomes of the reforms and how were these perceived by key stakeholders?

The final research question aims to explore what happened after the reforms were introduced, through an analysis of their implementation. Although this level of analysis includes a comparative element at a regional level, I will focus on Bahrain's reforms. The question allows me to explore the outcomes of the reforms, measured against the pre-defined performance indicators of the GEI, and uncovers the perceptions of the different stakeholders as to what happened and why.

Table 3-1 below summarises the levels of analysis in this study, the corresponding research questions and the data collection and analysis methods used at each level.

Analysis Level		Research Questions	Data Collection Methods		Data Analysis Method
			Primary	Secondary	
Regional	Level 1	RQ1: What are the 'contexts' of educational policymaking in the Gulf countries?	• Generic regional international organisation reports • Self-funded policy analysis reports • Commissioned reform reports • Government Documents	• Elite Interviews • News articles • Secondary Literature	• Qualitative Content Analysis • Narrative Analysis
	Level 2	RQ2: What were the critical features of the approach to educational reforms in the Gulf?	• Commissioned GEI reports • Government reform documents	• Elite Interviews • News Articles • Secondary Literature	• Qualitative Content Analysis
Regional/ Local	Level 3	RQ3: What were the outcomes of the reforms and how were they perceived by key stakeholders?	• Commissioned GEI review reports • Elite interviews	• News Articles • Secondary Literature	• Qualitative Content Analysis

Table 3-1 Research design

3.4 Methodological and Epistemological Implications

A review of the methodological debates within the field of comparative education reveals long-standing tensions from positivist and interpretivist paradigms that underpin the foundations of the field (Crossley, 2009). Nóvoa (1998, cited in Phillips and Schweisfurth, 2014, p. 11) argues that 'comparative education is a multi-disciplinary field, situated at a higher epistemological level'. As a multi-disciplinary field, comparative education includes scholars who are equipped with tools and perspectives from other fields and who choose to focus on educational issues in a comparative context (Manzon, 2011). Cowen (2009) argues that the earlier methodological debates in the field constructed a sort of comparative education-in-waiting and constituted one of the field's discontinuities.

> Comparative education as an academic subject … has not yet succumbed to the one true way of a specified methodology; nor has it accepted the seductive but corrosive position of claiming for itself disciplinary status in the terms defined so carefully by London philosophers of education (Cowen, 2006, p. 570).

Thus, in this case, the methodological approach derives from my epistemological stance as outlined above, and together they inform the comparative approach I adopt (Phillips and Schweisfurth, 2014). In essence, therefore, the philosophical foundations of this study emerged from the nature of the problem, the research questions and my positionality. It became evident that an interpretivist perspective was required to provide insight into the approach to reforms in an under-researched region that is overwhelmed by positivistic and hyper-rational approaches pioneered by the consultants and international organisations. The consequence of this is that a comparative qualitative inquiry was an appropriate choice of methodology.

Furthermore, this qualitative approach is also needed in the region around which this study is focused. Mazawi and Sultana (2010, p. 5) maintain that relying on qualitative data is unusual in the region, where 'education often tends to be represented and analysed in quantitative terms, with number toting often reinforcing a sense of deficit in terms of such indicators'. The literature review chapter of this thesis illustrated this under the discussion of the grey literature.

3.5 Data Collection and Analysis Methods

The previous section and Table 3-1, outlined the methods for each of the analysis levels in this study. Documents and interviews with elite policy actors served as the primary source of information, and secondary literature acted as a supplementary source. In what follows I present these methods in more detail.

Documents

Documents as a source of data have been a staple in qualitative research for many years. The advantages of using documents as a data source include efficiency, in comparison with other methods of data collection such as interviews which require travel; availability, either in the public domain or through the organisations and persons I have worked with; and being unaffected by the research process - my presence does not alter what is being studied. In addition, documents act as a reliable information source providing a good starting point for additional questions to be asked and they are an excellent record for tracking change and development (Bowen, 2009).

In this thesis, documents, particularly those that fall under the definition of 'grey literature', were an important source of data. Grey literature is defined as 'the literature that is not formally published in sources such as books or journal articles' (Lefebvre, Manheimer and Glanville, 2008, p. 106); the Grey Literature Report[7] specifies this as literature produced by all levels of government, and academics, business and industry, but which is not controlled by commercial publishers (Grey Literature Report, 1999). They may include, but are not limited to: reports, theses, conference proceedings, technical specifications and standards, non-commercial translations, bibliographies, technical and commercial documentation, and official documents not published commercially (primarily government documents) (ibid). Auger (2017, p. 1) argues that 'grey literature has come to constitute a section of publications ranking in importance with journals and books; this importance is now

[7] The report is a publication produced by the New York Academy of Medicine between 1999 and 2016, alerting readers to new grey literature publications in health services research and selected urban health topics.

achieving the recognition it deserves and grey literature is no longer the Cinderella of information sources'. Over time this body of literature has become a powerful source of data and policy analysis, and governments are increasingly relying on it to inform policy decisions (Davidson, 2017). This is especially true in the Gulf region.

The potential range of grey literature that could have been consulted for the purposes of my analysis was vast. I employed a purposive sampling strategy to narrow down the range. The documents were filtered firstly according to their relevance to the region and the time period, and secondly their focus on the education sector. Table 3-2 below provides a list of the main documents used under each level of analysis. These ranged from the reports of international organisations, consultancy reports (voluntary and commissioned), and government documents. Each of the documents used was also examined for authenticity, credibility, accuracy and representativeness.

Analysis Level	Research Question		Sub-analysis level	Document Details			
				Title	Author	Year published	Grey Literature Type
Level 1	RQ1: What are the 'contexts' of educational policymaking in the Gulf countries?	Chapter 4	Generic regional reports	Arab Human Development Report Series The Road Not Travelled: Education Reform in the Middle East and North Africa	UNDP World Bank	2002-2016 2008	International organisation reports
			Self-funded policy analysis reports	Improving Education in the Gulf The Role of Education in Preparing Graduates for the Labour Market	McKinsey RAND	2007 2010	Policy analysis reports
			Commissioned reform reports	Bahrain's Education Reform Bahrain's School System Reform Programme Education for a New Era: Qatar's K-12 Education Reform Implementation of the K-12 Education Reform in Qatar's Schools Education in Oman: The Drive for Quality	McKinsey/ EDB McKinsey/ EDB RAND RAND World Bank/ MOE	2006 2008 2007 2009 2012	Commissioned reports
		Chapter 5	Commonalities and Differences	Arab Human Development Report Series Improving Education in the Gulf The role of Education in Preparing Graduates for the Labour Market	UNDP McKinsey RAND	2002-2016 2007 2010	International organisations, consultancy reports
Level 2	RQ2: What were the critical features of the approach to educational reforms in the Gulf?	Chapter 6	Bahrain	Diagnostic Results Bahrain's Education Reform Bahrain's School System Reform Programme	McKinsey/ EDB McKinsey/ EDB Mckinsey/ EDB	2005 2006 2008	Government/ reform documents and commissioned GEI reports
			Kuwait	Strategic Plan 205-2025 The document for developing school-based educational reforms Kuwait education program achievement report	MOE MOE World Bank	2003 2008 2014	Government/ reform documents and commissioned GEI reports

			Oman	MOE reports/ Website SC reports/ Website	MOE and SC	2004 2008	Government/ reform reports
			Qatar	Education for a new Era: Qatar's K-12 Education Reform	RAND/ SEC	2007	Commissioned GEI reform report
			KSA	The National Strategy for Public Education Development in the Kingdom of Saudi Arabia	Tatweer	2013	Government report
			UAE/ AD	P-12 strategic Plan	ADEK	2009	Government reform report
Level 3	RQ3: What were the outcomes of the reforms and how were they perceived by key stakeholders?	Chapter 7	Analysis of outcomes in the Gulf	Kuwait education program achievement report Education in Oman: The drive for quality Implementation of the K-12 Education Reform in Qatar's Schools	World Bank World Bank RAND	2014 2012 2009	Commissioned GEI reform evaluation report
			Analysis of outcomes in Bahrain	Bahrain education review 2015: Volume one analysis and challenges Bahrain education review 2015: Volume two lessons learned and recommendations for action	SCET SCET	2016 2016	Government reform evaluation report

Table 3-2 Sample of primary source documents at each level of analysis

The sublevels specified under level one in Table 3-2 emerged from my analysis. I explain this in more detail in Chapter 4.

In addition to the documents listed in Table 3-2 above, I used other sources, mainly for triangulation purposes, but also as additional sources of information. These included news articles, online resources (such as blogs) and secondary literature. News articles discussing the reform initiatives in each country were scanned and selected. I focussed on those that appeared in national newspapers. In addition, I also browsed the government and educational authorities' websites to identify relevant materials and additional information, especially to update information cited in government reports in cases where the document analysed was more than 2 years old. Finally, secondary literature was used primarily for information purposes, especially in cases where access to the original government or GEI publication was not available (e.g. when the document had been taken down from websites).

Elite Interviews

Whilst documents are considered a source of data, they are limited given their non-responsive nature, and were produced for reasons that are not directly linked to the research questions (Coffey, 2014). Interviews, on the other hand, are more interactive and allow for probing of meaning and explanation (Flick, 2018). In my study, interview data complements the documentary analysis as they reveal more about the process of policy making. Thus, I undertook interviews with policy makers, policy implementers and GEI actors to gain additional insights into the dynamics and rationale of educational policy making. Together, these two data sources, documents and interviews, provided a clear picture of the approach to

reforms and, more importantly, an insight into the stakeholders' perception of outcomes.

Interviews with policy makers and holders of executive positions are often described as 'elite interviews'. Harvey (2011) argues that there is yet to be a clear-cut definition of the term 'elite'; however, he defines elite interviewees as 'those who hold important social networks, social capital and strategic positions within social structures' (p. 433). In this study, I chose for the elite interviews those who held senior or executive positions in government or private consultancy firms. The reason for this is that in Bahrain's centralised policymaking system, and the Gulf in general, only senior executives have access to information about policy decisions. In contrast to other types of interviews, elite interviews produce a power shift in which the researcher has less power than the respondent (Ball, 2005). This has significant implications for all aspects of the interview process, including access to research sites and respondents, the interview techniques that are needed, the interpretation of the data generated and ethical considerations (Walford, 2012). As indicated above, my prior knowledge of most of the participants minimised some of the 'process' related challenges as can be seen below, but interpretations and ethical challenges remained relevant, and I elaborate on these under the challenges section of this chapter.

The advantage of being an insider of this policymaking community in Bahrain minimised the challenges associated with identifying participants and getting access to them; in fact when they knew I was conducting data collection interviews in Bahrain, many of them approached me and volunteered to be interviewed. And whilst this was a welcome advantage, it did result in a number of implications for my methodology, and I explain these below.

Peabody *et al.* (2013) argue that semi-structured interviews are the optimal method for interviewing political elites as these allow more opportunity for probing and give the respondent considerable freedom to expand on a given question. Thus, to ensure I covered all of the topics I was interested in, I prepared an interview protocol (see Appendix 1) to assist me in steering the conversation.

Nonetheless, there are particular considerations involved in conducting elite interviews. Ball (1994; 2005) argues that peculiar difficulties are involved not only in interviewing but also in interpreting elite interviews. He notes that the policy elites are highly skilled interviewees and are well able to control the interview process and avoid difficult questions. I have thus approached these interviews with recognition that these could be an extension of the 'play of power' by skilled respondents. An advantage I had with the elites I interviewed was my previous knowledge of the reform and of them, thus I was often able to recognise when they were trying to take control of the interview or impose their agendas. Moreover, they offered to allow me to go back to them at any time I needed clarification or had more questions. I capitalised on this, especially when they avoided answering a question during the interview; I found that they could answer the same questions with more ease when approached in follow-up as they had time to think about how to articulate their response.

I used a purposive sampling strategy guided by the structure illustrated in Figure 3-1 to identify participants. Their position (role) and experience (knowledge) of the reform were the main criteria for selection. Thus, participants who held a role in the reform governance and were directly involved in the decision-making process were subsequently approached. Figure 3-1 below outlines the reform governance structure and how these participants were classified as policymakers, policy

implementers or policy consultants. Participants who were involved from the beginning had a continuity advantage and were interviewed first. As soon as I started interviewing participants in Bahrain, which is a small community, others asked to be part of the research or I was introduced to people by participants I identified, thus a snowball sampling strategy was also imposed. I agreed to interview the suggested participants. The reason I did that was because of the cultural context of the region which promotes personal recommendations and because I wanted to maintain a good relationship with those who suggested them and were more important for my research. However, as not all of the new participants suggested had direct involvement in the reform process, I managed the snowball sampling by imposing my two point selection criteria; this ensured that only people with relevant knowledge were interviewed.

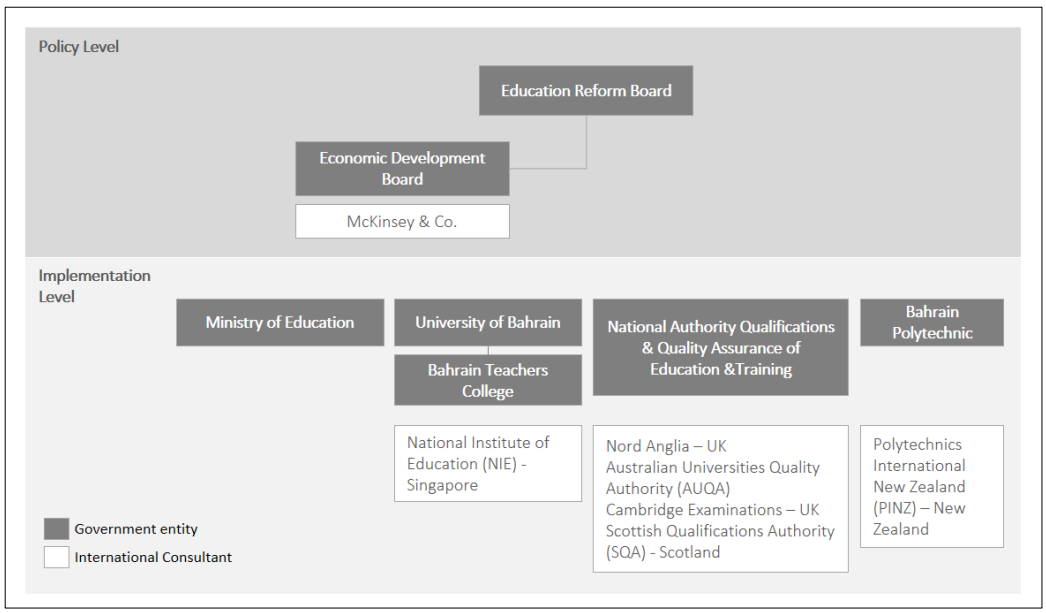


Figure 3-1 Selecting interviewees

The personnel in Figure 3-1 above comprised three main types of interview participants. Table 3-3 below summarises each type and the number of each type

interviewed. The number of participants was determined eventually by the range of policymakers, policy implementers and consultants who were available to be interviewed and I stopped interviewing new people once I felt confident that I had all of the data I needed to answer my research questions.

Participant Type	Description	Number Interviewed
Policymaker	These included the senior policymakers, e.g. members of the Education Reform Board, senior civil servants and senior officials in the reform initiatives	2
Policy Implementers	These included the middle management, not teachers or school leaders	2
Consultants	These included members of the GEI or expatriate employees hired to hold executive positions in the reform structure	4

Table 3-3 Interview Participants

I invited participants through email and official invitation letters. Emails formed the initial approach but, given the cultural context of the region, an email was not always seen as an official way of communication, and therefore an official letter was prepared as a follow-up to the initial email to formalise the request for the interview when needed.

Analysis Methods

Interpreting the data is the core of qualitative research and, in this study, I was dealing with a large amount of data. I collected data about 6 different countries from a variety of sources, which included grey literature, news articles and interviews. I used a two-step strategy to manage and analyse the data. As a first step, I applied Qualitative Content Analysis (QCA) as a data analysis method across all of the data sources to reduce and organise the data. The second step, which was applied only to analysis of the grey literature, was used as a complementary method of

interpretation: I used Narrative Analysis to identify the ‘contexts’ of policymaking that I will discuss in Chapter 4.

Schreier (2012, p. 1) defines QCA as ‘a method for systematically describing the meaning of qualitative data’. QCA was of particular use in this study because it is characterised by its utility in ‘reducing data’ (Flick, 2018, p. 483). Unlike other qualitative methods, this method helps reduce the amount of material by requiring the researcher to focus on selected aspects of meaning, namely those related to the research question (Schreier, 2014). This was especially useful in the comparative sections in this study.

QCA is performed by assigning successive parts of the material to a coding frame. The coding frame consists of ‘categories’ which are the main aspects on which the analysis is focused, and ‘subcategories’ which specify what is said in the material with respect to the categories. The coding frame for this study is illustrated in Figure 3-2.

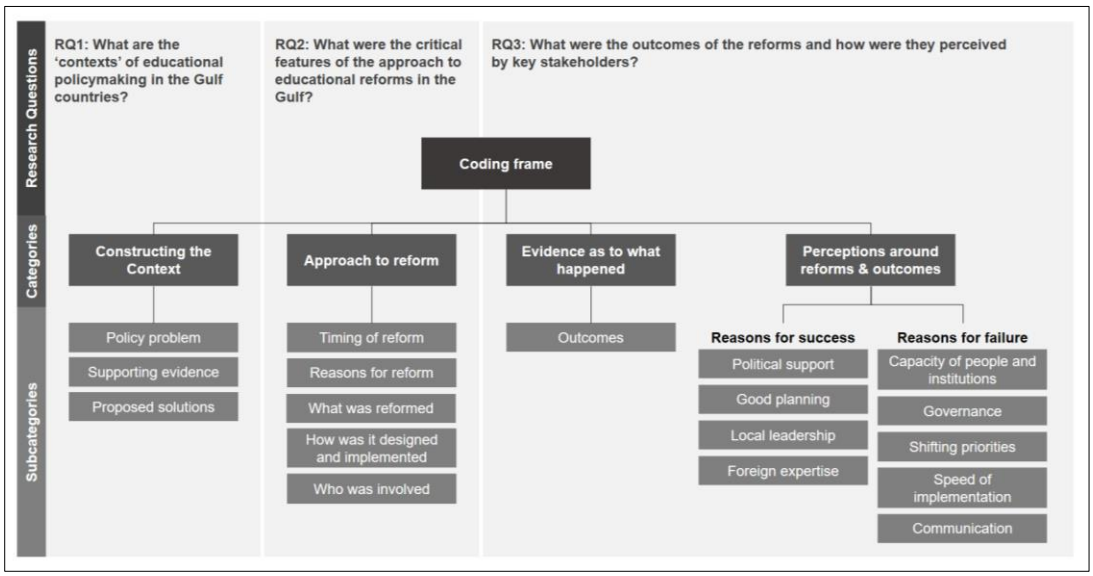


Figure 3-2 Coding Frame

In developing the coding frame illustrated above, I followed the four steps developed by Schreier (2012; 2014). First, I organised the material by type, source and topic. For example, I classified the documents as outlined in Table 3-2 or interviews by participant type as illustrated in Figure 3-1. This process was also supplemented with a preliminary reading to distinguish relevant material within the data. This stage involved identifying patterns and regularities across the data I collected. Once the different data sources were organised, I selected a representative sample from each data source in preparation for the next step, in which I piloted the material to develop the coding frame.

Usually in QCA no special preparation of data is required, thus there was no need for a detailed description of paralinguistic features when transcribing the interviews. But because QCA is concerned with describing meaning in context, relevant context should always be made available in or with the material. Transcripts should be complete, and should not leave out anything that might seem 'unimportant'.

The second step in generating the coding frame was developing the structure and generating the categories. I used an inductive data-driven strategy, allowing categories to emerge from the material. To do so, I used a summative strategy (Mayring, 2010 cited in Schreier, 2014), which involved paraphrasing relevant passages and summarising the results into categories and subcategories. As a result, the coding frame consisted of four main categories and 18 subsequent subcategories as illustrated in Figure 3-2 above.

The third step was to define the categories and subcategories of the main coding frame. The definitions were used in the segmentation process as rules for

assigning units of the material I analysed to the categories and subcategories. The categories and subcategory definitions are included in Appendix 2.

The material is segmented in such a way that one segment is classified under one sub-category. All material must be covered by a category (requirement of exhaustiveness). I divided the material into units in such a way that each unit fits exactly into one (sub)category of the coding frame. These coding units are those parts of the material that can be interpreted in a meaningful way with respect to the subcategories. I used a thematic criterion as a strategy for segmentation in this analysis, it involved looking for topic changes, and one unit essentially corresponds to a theme. An example of how this was done is illustrated in the Figure 3-3 below.

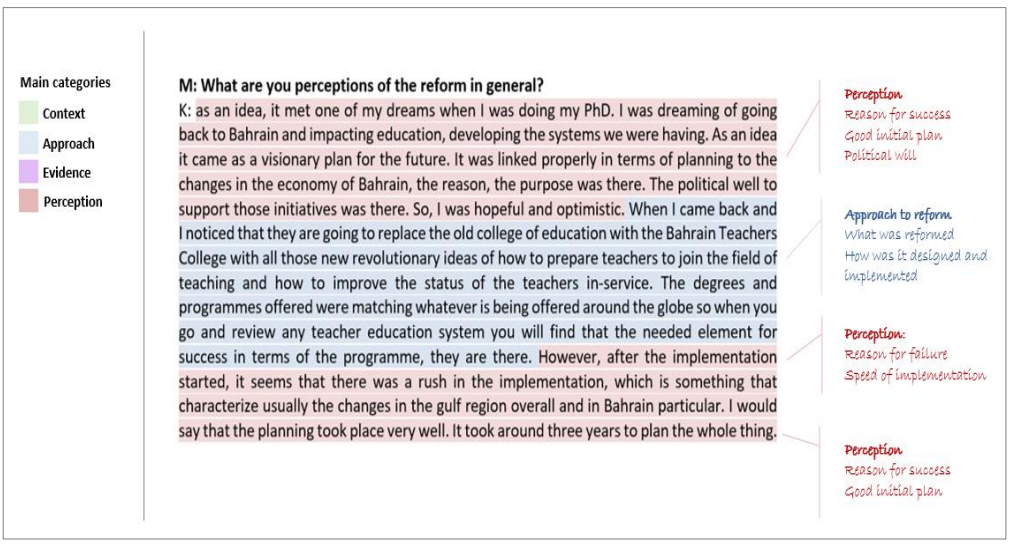


Figure 3-3 Sample of material segmentations

Finally, in the fourth step, the elements of the coding frame were revised, making sure that the categories were mutually exclusive, sub categories that had significant overlap were merged, and the frame was piloted using one example of each type of source.

Once the main coding frame was finalised, it was applied to the rest of the material. Excerpts from the documents and interview transcripts were organised into tables and each excerpt was assigned a subcategory organised under a category heading. With QCA the main coding frame itself can be the main result, in which case, the presentation of findings involves presenting the frame and illustrating through quotes. In this study, I used the categories to organise the presentation of the data in the analysis chapters as a first step and the moved beyond to discuss the relation between them. Because this method focuses on description, it was useful for arranging and reducing data. Where additional analysis was needed. I combined this with a different method, e.g. in Chapter 4 where I used the concept of framing to give meaning to my interpretations. The categories and their associated subcategories as chapter headings are illustrated in Table 3-4 below.

Research Question	Chapter	Category and Subcategory/ Chapter Headings		
RQ1: What are the 'contexts' of educational policymaking in the Gulf countries?	Chapter 4	Constructing the context	Policy problem	
			Supporting evidence	
			Proposed solutions	
RQ2: What were the critical features of the approach to educational reforms in the Gulf?	Chapter 6	Approach to reform	Timing of reform	
			Reasons for reform	
			What was reformed	
			How was it designed and implemented	
			Who was involved	
RQ3: What were the outcomes of the reforms and how were they perceived by key stakeholders?	Chapter 7	Evidence as to what happened	Outcome	
		Perceptions around reforms and outcomes	Reasons for success	Political support
				Good planning
				External expertise
				Local leadership
			Reasons for failure	Capacity of people and institutions
				Governance
				Shifting priorities
				Speed of implementation
				Communication

Table 3-4 Categories of main coding frame applied as chapter headings

3.6 Challenges, Quality of Research and Ethical Considerations

Challenges

Over the 4-year period of this study, I encountered a number of challenges, some of which were expected and easily managed while others necessitated changes to the original research plan. In this section I focus on the main challenges that had changed elements of my original plan.

During the course of my study, the Gulf region was going through a defining period in its history. Following the establishment of the GCC in 1981, the 6 member states had displayed an exemplary model of union and stability in a tense Middle East region. However, this situation changed in June 2017 when Bahrain, Egypt, Saudi Arabia, and the United Arab Emirates cut diplomatic ties with Qatar over continued frustration with Qatar's foreign policy and its funding of, and assistance to, Islamist groups designated as terrorist organisations. The remaining Gulf States - Kuwait and Oman - did not cut ties with Qatar, with Kuwait offering to mediate in the dispute. Nevertheless, the dispute has continued since and at the time of the completion of this thesis, there appears to be no solution in sight.

In parallel, Saudi Arabia underwent political significant changes, almost to the point of being unrecognisable. Since King Salman Al Saud ascended the throne in 2015 and appointed his son as Crown Prince in 2017, ambitious social and economic changes were introduced, defying the kingdom's conservative reputation. New reforms fundamentally altered decades of royal family protocol, social norms and traditional ways of doing business; and it is still not easy to make sense of the 'new' Saudi Arabia and its impact on the region.

The implications of these changes for my thesis have therefore complicated the process of articulating the socio-political context. I revisited the contexts chapters

several times to keep them up to date with changes occurring almost on daily basis. More directly for my study, the dispute with Qatar led to travel restrictions for Bahrainis. This had serious implications for my research as I had originally intended to interview participants from Qatar as well as Bahrain, but this led me to focus solely on Bahraini participants.

The other challenge, which was not related to the political dispute in the region, resulted from the change of my research focus as I progressed after the upgrade. I conducted most of my fieldwork following my upgrade and at that time, the last research question was not clearly defined. The decision to include a focus on the implementation of reforms and their outcomes resulted from the analysis of the contexts and the approach of the GEI, thus it became necessary to highlight the success or failure of these reforms and, in doing so, I found myself in a position where I had to revisit the interview transcripts. Fortunately, as is often the case with elite interviews, the participants imposed their own agendas in the interviews, and had elaborated at length on their perceptions and views as to the impact of the reforms. This was partly a result of timing as the interviews were conducted when Bahrain was formally reviewing the progress of the reforms and most participants were eager to allocate the locus of blame elsewhere!

Finally, there were two challenges associated with data collection. Given the timeline of conducting this study, some of the documents I had relied on were found online but over time many of these were taken down to be replaced with updated versions. Fortunately, this was not a cause for concern as I had downloaded and retained copies of the original reports. However, this challenge needs to be considered by other researchers, especially with the pace at which organisations today update their strategies, policies and websites. And whilst accessing interview

participants for this study was not challenging, managing them during the interview required certain strategies. They all were very eager to share (sometimes over-share) their views of the reforms and analysis of issues. Given their positions of authority and, in some cases, their familiarity as former colleagues, some of them asked for certain things to be included in my study, e.g. they would say: 'you have to write this' or 'you need to include this … in your thesis'. I was aware of this, as other researchers have identified such tendencies when interviewing elites (Ball, 2005; Harvey, 2011; Peabody *et al.*, 2013). Thus, in reading the interview transcripts, I have carefully considered such responses, and assessed their relevance for my study.

Quality of Research

As qualitative research continues to compete with quantitative paradigms in terms of reputation, funding and legitimacy, the quality of qualitative research has come under scrutiny with scholars debating its 'validity and reliability', two terms that are originally associated with the quantitative approaches (Denzin and Lincoln, 2000, p. 17) and are often replaced with 'trustworthiness, credibility and dependability' in qualitative approaches (Lincoln and Guba, 1984). Notwithstanding the terminologies and the continuing debates, two measures are used in this study to ensure the quality of both the data and interpretation. Firstly, the embedded quality measures within the different methods of collection and analysis are central to the overall reliability. Secondly, as Lincoln, Lynham and Guba (2011) stress, the rigour of interpretation of results in qualitative research is as important as the rigour in the application of methods. Thus, triangulation and reflexivity are two strategies used to extend the credibility of the study and its results.

Denzin (2009) uses the concept of triangulation, and distinguishes four types - data, investigator, theory and method. In this study, I triangulated by combining the different data collection tools to elicit different sources of evidence and corroborate findings; using multiple sources helped me verify the accuracy of the data and its relevance. In the interviews for example, policymakers often confused phases of reforms; for this reason, I triangulated what they said with the data in documents, prioritising the latter for accuracy. Sometimes the documents were incomplete and, in this case, interviews were essential in completing the data. Moreover, as an insider, reflexivity – which is 'the process of a continual internal dialogue and critical self-evaluation of researcher's positionality as well as active acknowledgement and explicit recognition that this position may affect the research process and outcome' (Berger, 2013, p. 2) – is an important strategy for avoiding bias. van Heugten (2004) highlights several other tools the insider researcher may employ to avoid bias: stream of consciousness writing, interviewing oneself, and speaking with others about the experience to create distance and deconstructing the familiar world. van Heugten (2004) emphasises that the insider researchers' subjectivity must be 'open to intensive scrutiny' and 'challenged on an on-going basis' (2004, p. 208). In this regard, I found the monthly presentations of progress at the PhD tutorial sessions organised by my supervisor to be essential; presenting at academic conferences and publishing my work also exposed it to scrutiny and challenge, which helped me identify my biases and eliminate them.

Ethical Considerations

This section addresses ethical considerations and the ethics guidelines followed within this study. Ethical approval was granted for conducting the interviews by the

UCL Institute of Education in 2016.

As discussed above, the ethical issues imposed by my position as an insider included subjectivity and bias, resulting in the risk of imposing my perceptions/views unintentionally on the data. There was also the risk that, given my background and the fact that I was known to many of the interviewees, they would modify their expressed views to accord with their opinions of what they felt appropriate to share with me. I maintained my outsider perspective, and limited the associated subjectivity, by ensuring the participants were fully aware of my current position. I ensured that they were fully briefed on my research, through an information sheet (Appendix 3) that was shared with all participants ahead of the interview. I also spent a few minutes at the beginning of each interview explaining my new position so that they were aware that their views should not be affected by what they may consider as 'what I want to hear' given my previous role in the reform process.

Notwithstanding the measures I took, I could not escape the fact that I was, in some important aspects, an insider-researcher, having worked within the context I was researching. I also understood that the interviews were conducted alongside my professional relationships, sometimes on the back of these, and what the research uncovered had to be lived with in the professional setting (Floyd and Arthur, 2012). Bahrain is a small country, and the pool of people involved in policymaking and implementation was relatively small. For example, at the 'policy-making' level of the reform governance structure in Bahrain (see Figure 3-3), only one consultancy firm was in involved in assisting the Economic Development Board with setting the reform agenda; the local decision-makers were also very well known to everyone involved. It was thus important to anonymise the participants in my research. To ensure the anonymity of participants, I used a broad definition when referring to

them. In one case, for example, I used the general term ‘policymaker’ instead of the more specific designation of ‘Undersecretary’ and did not specify their organisations.

Importantly, the topic of this study is considered politically sensitive as it reflects on the work of governments in a context that has not yet adapted to critical academic analysis. In this study, I continually assessed the sensitivity of the data I collected and as well as my analytical interpretation of these, especially in terms of the issues that could arise once the thesis is published, both for me as a researcher and for my participants. In addition, the University of Bahrain, a government entity, funded my scholarship. Thus, the findings of my study may be viewed as too critical of the government processes and decisions. As a result, I need to consider the findings and articulate the developing argument carefully without compromising the quality of the thesis.

Furthermore, informed consent was obtained before I conducted interviews. The practice of signing a written consent form is seen as being inappropriate in the Arab context (Makhoul and Nakkash, 2017), where people prefer to share information verbally and are afraid of signing forms (ibid). For this reason, I offered participants the choice between written consent (see Appendix 4) or putting their verbal consent on record in the audio recording. Whatever the choice, I guaranteed participants privacy and confidentiality. All participants were given a copy of the transcript of their interview for reference, and participants who had given unusually strong or critical statements about the process of policymaking were contacted a second time to review their statements (in the findings) to ensure that these reflected what they had intended to say. They were all happy with their original responses as long as anonymity was guaranteed. I also reassured participants that they were entitled to withdraw from the research at any time without prejudice, but no one did.

Moreover, in accordance with the ethical guidelines of the UCL Institute of Education, I ensured that all personal and sensitive data collected from/ about the participants and their organisations were stored under encryption, and anonymised; I will ensure that the data is destroyed as soon as these are no longer needed.

In the next chapter, I problematise the context of educational policymaking in the Gulf as constructed by the GEI actors involved in the policymaking process in the region and I expand the analysis of context beyond the GEI actors' depiction in Chapter 5.

Chapter 4 **Problematising 'Context(s)' of Educational Policymaking in the Gulf**

I suggested in the introduction that a distinctive approach to educational reform has emerged in the Gulf, and that the approach is characterised by intensive policy borrowing and an extensive reliance on GEI actors, especially consultants. My initial intention, which has been influenced by the conventions of thesis writing, and the inherent assumption within that around the neutrality of 'context', was to include a chapter at the outset of my study, describing the contextual background of educational policymaking in the Gulf.

The literature review chapter highlighted the dearth of critical academic literature investigating educational reforms that swept the Gulf over the last two decades, and demonstrated that the forces shaping educational policy change in the Gulf States remain under-researched. In contrast, there is a substantial body of grey literature produced by the GEI that influences academic writing and informs educational policymaking in the region. A preliminary review of the former revealed that in these documents the local context was presented in almost purely economic terms. Thus, relying on a review of this literature to provide the contextual background for this study would seriously confine portrayal of what is appropriate and relevant knowledge.

Hence, in this chapter, I problematise the context of policymaking in the Gulf by analysing it and making it a 'matter of concern' as opposed to it being a 'matter of fact' presented at the outset of my study (Sobe and Kowalczyk, 2013, p. 17). Using the concept of framing from policy studies, I will analyse the grey literature and argue that the context has been used as framing device by the GEI actors to construct a policy narrative that legitimises their expertise and serves as a powerful marketing

tool to sell their services, while also providing them with a strategy to manage any failure in delivering their recommended reforms. In doing so, I address the first research question: **What are the 'contexts' of educational policymaking in the Gulf States?** The answer to this question continues in chapter 5, where I go beyond the GEI framing and explore the different contexts of policymaking in the region.

This chapter is presented in two parts. The first explores the concepts of 'context', 'transfer' and 'policy framing' to develop the foundations for the analysis. Using comparative education (CE) literature as a starting point, I begin with a discussion of the concept of 'context' and its relation to 'transfer' to demonstrate how contemporary analysis in CE does not explain what I have observed in the Gulf, specifically around the construction of 'context' by members of the GEI. Subsequently, I review the political science (PS) literature to explore concepts of 'policy framing', focusing on the role of non-state actors in policymaking. In the second part of the chapter, I analyse the GEI reports to illustrate how context is used as a framing device to construct a policy narrative that portrays the educational policy problem in a way that makes the GEI's recommended course of action appear to be the most appropriate whist providing them with a contingency plan to manage failure in delivery.

4.1 Context and Transfer

Since the inception of comparative education, scholars have debated the concepts of context and transfer and their relation yet, according to Cowen (2006), the intellectual problems produced by their conceptualisations have not yet been fully resolved. A review of the debates within the field of CE reveals long-standing tensions from two epistemological perspectives that underpin the foundations of the

field and, within that, their approach to context and its relation to transfer (Crossley, 2009). At one end stands the positivistic form of comparative research in education and, on the other, the interpretive perspective.

Jullien de Paris's proposed 'Plan' for a science of education in 1817 (Fraser, 1964) characterised much of the 19th Century positivist approach to comparative education. From de Paris's point of view, education was independent from its context and could be analysed separately; thus, educational transfer is a possible and desirable process (Beech, 2006). At that time national school systems were being established and governments commissioned educationists and administrators to travel, study other systems, and identify transferable practices; they included, Victor Cousin from France, Horace Mann from the United States, and Matthew Arnold from the United Kingdom (Noah and Eckstein, 1969). Countries looked elsewhere to modernise their education system, and examples of borrowing practices that occurred in this period were presented in Chapter 2. These practices reflected the spirit of the time in which context was downplayed and the emphasis was on transfer in the quest for rapid modernisation.

Nevertheless, the positivist views did not go unchallenged. The Russian scholar, Ushinsky, like the travelling administrators, spent time in the mid-19th Century studying other education systems and concluded that 'every nation has its own particular national system of education; therefore, the borrowing by one nation of educational systems from another is impossible' (Ushinsky, 1975, p. 205 cited in Beech, 2006). His view was representative of the interpretive approach which brought to the forefront the issue of context and the dangers of uncritical transfer. Michael Sadler's widely acknowledged warnings in 1900 emphasise the importance of context in the shaping of educational institutions and practices (Sadler, 1979)

The end of the First World War prompted an interest that extended comparative interests into what Nóvoa and Yariv-Mashal (2003) called 'understanding the other', and scholars of this period were interested in understanding local contexts. For example, Hans (1967) emphasised socio-historic context, as expressed in his analysis of 'factors and traditions' (Hans, 1967 cited in Cowen, 2006), denouncing any participation of comparative educators in practical matters.

The end of the Second World War, the collapse of colonialism and emergence of new nations, and the establishment of international organisations revived the positivist approach, pushing the debates about context to the background and focusing once again on transfer with the aim of devising a model that guarantees success. Noah and Eckstein (1969) promoted such work in the United States while, in the United Kingdom, Holmes (1965; 1981) sought to advance the scientific model by promoting what he called the 'problem approach' to social science and comparative education.

Today, both perspectives are evident in the debates; writers in both groups are very aware of the concept of context in their research. Interpretivists continue to call for a critical analysis of local contexts to interpret transfer, (e.g. Phillips and Ochs (2002; 2003; 2004); Steiner-Khamsi (2004; 2012; 2006); Jürgen Schriewer (2004); and Rappleye (2006; 2012b)). Alongside this, intensified global educational competition which centres on comparative metrics has heightened the prominence of applied comparative and international research. Cowen (2018, p. 208) refers to this applied approach to comparative education as 'sophisticated *Auslandspädagogik'*[8]

[8] This is German for 'education in 'other lands' (Kaloyannaki and Kazamias, 2009).

and argues that it is shaping the politics of educational reforms worldwide and makes context invisible. Crossley and Watson (2003) argue that the issue of context has been challenged by the intensification of globalisation and, within that, by the move towards evidence-based policymaking under the influence of global governance structures.

Despite the substantial debates about context in CE, and the emerging problematisation of the concept (Piattoeva, Klutas and Souminen, 2019; Sobe and Kowalczyk, 2013), Cowen notes that 'we are nowhere near having sorted out, intellectually, the problem of context'; he further argues that 'the way we ask about context is probably wrong' (2006, p. 567). A notable first step towards revising questions about 'context' rests within the work of Auld & Morris (2014; 2016). Through their analysis of GEI documents, they demonstrate the strategies employed to enhance the persuasiveness of texts advocating the transfer of best practices. They argue that 'these strategies combine to create a system that is closed conceptually, collapsing complexity and reinterpreting the nature of social reality to enable the delivery of the research ambition' (Auld and Morris, 2016, p. 224). In other words, these are strategies designed to navigate away from the complexities of 'context'.

It is important to note that, in this chapter, I do not seek to add to the literature that attempts to resolve the problem of context; rather, I build on the existing studies and offer new understanding through a different empirical setting to demonstrate how commissioned GEI actors' treatment of 'context' changes from being a strategy that reduces the complexity of transfer to becoming a core feature of the GEI's advocacy of policy transfer that serves to market their business model.

4.2 Policy Framing

In political science, specifically policy analysis 'for new policies'[9], the importance of framing a policy problem has been long recognised. Majone (1989) has demonstrated that good policy analysis revolves around crafting an argument, which has been described as the 'argumentative turn' (Fischer and Forester, 1993). This refers to a group of different post-empiricist approaches that emphasise the increased relevance of argumentation, language and reflexion in the process of policymaking. These approaches, though for a long time treated as inferior to rigorous scientific methods and objective data, serve as an alternative to dominant technocratic and empiricist models in policy analysis (Eeten, 2007).

Among these new approaches is narrative policy analysis which has become a central method of study within policy studies; it concerns itself with stories, told in oral or written form, that reveal or convey someone's experiences (Fischer, 2003; Roe, 1994). Narratives are powerful tools that can shape people's realities and emotions. In defining the elements of policy narrative, McBeth, Jones and Shanahan (2014) identify the 'setting' as one of the core elements. They maintain that:

> policy narratives always have something to do with a policy problem and are situated in a specific policy context. As such, the setting of a policy narrative consists of policy consequential phenomena … that most actors agree are part of the considerations one must come to terms with when dealing in a particular policy area (ibid, p.228).

In the quote above, the consequential phenomena of the setting includes amongst

[9] In the traditional policy literature, a distinction is made between what is called analysis *of*, and analysis *for* policy. The former is conducted to understand why a particular policy was developed at a particular time, what its analytical assumptions are and what effects it might have. The latter, analysis *for* policy, refers to research conducted for actual policy development, often commissioned by policymakers insider the bureaucracy within which policy will be developed. (Rizvi and Lingard, 2010)

other things scientific evidence. Policy narratives are closely aligned with policy problem definition, arguably the most crucial step in the analytic process (Clemons and McBeth, 2001). Weiss argues that 'Problem definition is more than the overture to the real action; it is often at the heart of the action itself' (1989, p. 98). She argues that the problem definition has important implications for which kinds of 'evidence bear on the problem, which solutions are considered effective and feasible, who participates in the decision process, how policies are implemented, and by which criteria policies are assessed' (ibid, p.98). Thus, as Stone (2012) asserts, the goal of strategic problem definition is to portray a political problem so that one's favoured course of action appears to be in the broadest public interest. In other words, the narrative in which the policy problem is introduced dictates what evidence bears on the problem and becomes essential to the selection of the policy solution. (Stone, 1989) identifies how causal stories have become essential in agenda setting as part of policy storylines, and Auld (2016) has demonstrated how such causal stories are used by the GEI in developing arguments for policy intervention (story of decline) and then for proposing policy solutions (story of control).

Similarly, Schön (1993, p. 146) argues that 'each story constructs its view of social reality through a complementary process of naming and framing'. Stories are constructed through frames that control the narrative and serve a strategic purpose. The concept of the 'frame', introduced in sociology by Goffman (1974, p. 21), describes a 'construction of reality' used 'to locate, perceive, identify, and label events and occurrences, thus rendering meaning, organizing experiences, and guiding actions'. The concept of framing has been applied in different disciplines e.g. economics (Tversky and Kahneman, 1986), cognitive linguistics (Lakoff, 2004), and communication (Entman, 1993).

In policymaking, framing has been identified as a 'weapon of advocacy' (Weiss, 1989). Politicians have long recognised the power of framing their policy narrative. Framing has thus been used systematically as a campaign tool (Scheufele and Tewksbury, 2007). Lakoff (2004), who also authored a manual for US liberals on how to successfully frame their messages (Lakoff, 2002), argues that framing is a useful tool in persuading a political audience, as it presents the facts of an argument to influence the ways in which the audience view a policy problem and, as a result, authorise some policy solutions and not others.

Contemporary policymaking is now occurring within 'new political spaces', requiring us to rethink our understanding of policy analysis (Hajer, 2003). Hajer (2003) argues that in these 'new political spaces', decision-making is expansive and dispersed within wider spatiality; it includes different actors, and requires different knowledge and interventions. Lingard, Creagh and Vass (2012) argue that this has resulted in a need for certain knowledge expertise in response to the demand for evidence-based policy research that enhances the significance of *evidence* and *measures of performance* in policymaking.

Where once policymaking was a function of the state, attention has shifted to non-state actors and their role in policy agenda-setting. Stone argues that these actors now play a prominent role in policy problem definition and 'perform a range of ancillary activities that help amplify their policy analysis and sometimes propel their policy products into decision-making' (2007, p. 149). Auld (2016) has identified the centrality of policy narrative in the contemporary policy-oriented educational comparisons produced by these non-state actors in education. Auld's analysis focuses on texts that were produced by key actors at the global level. In this chapter, the analysis will focus on how the framing used by non-state actors in defining the

policy problem differs from that of traditional policymakers, and it will demonstrate that the key element of framing involves the construction of the 'context'.

GEI actors realise the importance of narratives and framing, often presenting 'framing' as a 'best practice' for policy advocacy (Lambino, 2009), the quote below from a report authored by Michael Barber, a former British educationist and head of the UK government's Delivery Unit, following a conference on Qatar illustrates the importance of a 'crafting a compelling narrative':

> Targets and data are important, but they need to be set within a context and surrounded by a compelling narrative. This helps to ensure the best possible prediction, and ensure that those involved are motivated by a moral purpose. Take for instance, the statistics outlined in the annex showing the low levels of attainment in much of the MENA region. Achieving a certain pass rate in literacy and mathematics is important, but it's not the main point. The main point is that children should be leaving primary school with the ability to read and write, skills that are essential in the modern world and that will change their lives.
>
> In Dubai, for instance, school reform efforts involved the introduction of a new inspection regime. To ensure that different stakeholders were informed, a communications campaign was carefully crafted, targeting the different groups – such as parents, private school owners, the business community and media – who were affected by the change. The communication has been so successful that the new transparency about school performance is deemed 'irreversible, with data now viewed by parents and media as an 'entitlement''. This is vital in two ways. Firstly, it outs pressure on those delivering services to perform well, and secondly, it helps makes change irreversible by maintaining focus on delivery (Barber, 2017, p. 16).

The quote above illustrates how GEI actors approach framing. I demonstrate in the analysis section below how 'commercial' actors of the GEI, such as consultants, have constructed a selected view of the local context to frame targets and global comparative data of international organisations. I argue that by using a selected view of the local context as a framing device, commercial GEI actors build a compelling policy narrative that promotes their expertise and proposed solution.

4.3 Context as a Framing Device

In order to capture the utility of context as a framing device, I return to its definition. Cowen (2018) asserts that there is no shortage of definitions of context within the literature and points to the link between contextual background and narration: 'comparative educationists spend much of their time narrating "context"' (2018, p. 205). In dictionaries, context is defined as 'The circumstances that form the setting for an event, statement, or idea, and in terms of which it can be fully understood' (Oxford Dictionaries, 2019). In other words, context itself can be understood in the same way as the 'frames' of policy narratives. Dilley argues that context is a process of making connections:

> contexts are sets of connections constructed as relevant to someone, to something or to a particular problem, and this process yields an explanation, a sense, an interpretation for the object so connected. The context or frame also creates a disjunction between the object of interest and its surroundings on the one hand, and those features which are excluded and deemed as irrelevant on the other (Dilley, 1999, p. 2).

Thus, context in itself is a frame and a device:

> Connections made with one domain imply a series of disconnections with another: contexts not only include certain phenomena as relevant, they exclude others as marginal or put them out of the picture altogether (ibid, pp.14-15)

Weiss articulates the same idea in her reflection on framing policy problems:

> By the frame imposed on circumstances, a problem definition highlights some aspects of the situation, throwing other aspects into shadow (1989, p. 97)

The GEI's approach to contextualisation in the Gulf exemplifies an acute representation of this use of framing, in which consultants construct the educational policy problem explicitly through a perspective that emphasises certain contextual connections whilst omitting or downplaying others. The analysis of GEI publications below will demonstrates how this is done.

4.4 Analysis

In this section, I analyse key GEI publications focusing on education in the Middle East and North Africa (MENA) and the Gulf region. These texts constructed narratives that defined problems of the education systems in the region, what counts as evidence, and the recommended courses of action to resolve these problems. A preliminary review of these documents indicates that the construction of the 'context' is approached differently depending on the purpose of the GEI publication and the publisher. Three possible levels of analysis emerge from this preliminary review, and I will now use these levels of analysis to examine the construction of context in greater depth, as illustrated in Figure 4-1 below.

The first level concentrates on the reports published by international organisations such as the World Bank and the United Nations Development Programme (UNDP), and address the region in general. These reports are produced voluntarily (i.e. not commissioned by a third party) and their remit ranges between an explicit focus on education on the one hand, and an implicit one on the other. The second level focuses on the publications of commercial consultancies and think tanks operating in the region. As with the reports in the previous level, these are also published voluntarily; however, unlike the first set of reports, their focus on education is explicit. The third level involves consultancy reports that were commissioned in response to a request at the country level to improve the education system. Table 4-1 below summarises the key publications analysed at each level.

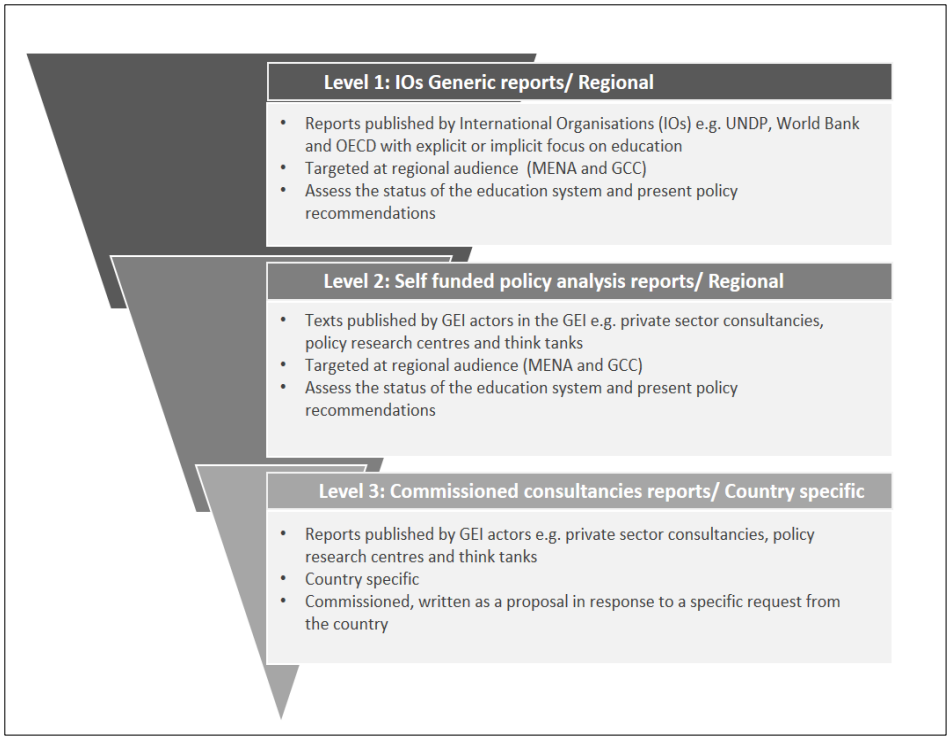


Figure 4-1 Analysis Levels

Analysis Level	Publisher/ Author	Year	Title	Purpose/ Focus
Level 1	UNDP	2002-2016	Arab Human Development Report Series	Voluntary / Implicit
	World Bank	2008	The Road Not Travelled: Education Reform in the Middle East and North Africa	Voluntary/ Explicit
Level 2	McKinsey	2007	Improving Education in the Gulf	Voluntary / Explicit
	RAND	2010	The role of Education in Preparing Graduates for the Labour Market	Voluntary/ Explicit
Level 3	McKinsey/ EDB	2006	Bahrain's Education Reform	Commissioned/ Explicit
	McKinsey/ EDB	2008	Bahrain's School system reform programme	Commissioned/ Explicit
	RAND	2007	Education for a new Era: Qatar's K-12 Education Reform	Commissioned/ Explicit
	RAND	2009	Implementation of the K-12 Education reform in Qatar's Schools	Commissioned/ Explicit
	World Bank	2012	Education in Oman: the drive for quality	Commissioned/ Explicit

Table 4-1 Summary of publications analysed at each level

Level 1: Generic Regional Reports

The publications analysed in this section have influenced and stimulated the educational transformation projects that emerged simultaneously in the Gulf region at the start of the 21st Century, are widely cited in academic literature, and remain key sources that inform educational policymaking in the Gulf region (Abi-Mershed, 2010). Donn and Al Manthri reflect on the intensive presence and influence of the international organisations that published these reports in the Gulf:

> There had been World Trade Organisation, European Union and World Bank visitors to the Sultanate of Oman. A series of seminars had been arranged to facilitate discussions between these key agencies and personnel from Ministries in Oman. We knew that the outcome would be further elaboration of Oman's Basic Education Reform and extended support for education developments in Oman. What we didn't know was the range of countries similarly addressed by intensely mobile international agencies.
>
> We spoke to colleagues in the other Gulf States and heard that they, too, had been approached by the World Trade organisation, the European Union and the World Bank. They, too, had been in discussion about education reform and had been asked to consider the introduction of various education policies
>
> … we knew that the 'key players', acting under the principles of the market and neoliberalism, had encouraged the Gulf state to transform their education systems, from historical and indigenous to current and global (Donn and Al Manthri, 2013, pp. 7-8).

As explained the chapter 3, the sample of GEI reports was large; however, I selected the World Bank and the UNDP's AHDR reports because of their great influence, as illustrated by the quote above. Reports at this level fall into two groups depending on their focus. The first targets the region's education sector explicitly, whilst the second discusses a wider range of issues including education. In the first group, the World Bank's 'flagship' report published in 2008 (World Bank, 2008) remains one of the most influential in informing educational policymaking in the region and is widely cited in the academic literature. In the second, the UNDP's

AHDR series (2002-2016) has a wider remit and views education as an integral part of human development.

The reports were produced at a time when the Arab World was under Western scrutiny, following the events of September 2001. The UNDP maintains that the founding series of the AHDR were introduced in response to the 'sense of urgency among Arab thinkers about the precipitous situation of Arab countries at the start of a new millennium' (UNDP, 2016a). The World Bank's report, prepared by the staff of the International Bank for Reconstruction and Development, is part of the MENA development series which aims to enrich the debate on the major development challenges and opportunities in the region. Both texts had a noticeable impact in renewing and highlighting reforms in the region:

> Much debate and widespread criticism about education systems of MENA countries have followed the publication of the AHDR series between 2002 and 2006 by the UNDP, and the World Bank's MENA development report of 2008 entitled The Road Not Travelled: Education Reform in the MENA (Rohde and Alayan, 2012, p. 1)

The reports' perspectives reflect the ideology of the publishing organisation. The World Bank's report situates the education system in, and sees its problems through an explicit economic perspective and bases its analysis within a large body of literature that views investment in education as the driver of economic development:

> This report focuses on the economic rather than the social and cultural dimensions of education. Its approach in answering the questions raised is analytical and comparative in nature. Education outcomes in the region are compared with education outcomes in other developing countries. (World Bank, 2008, p. 2)

The AHDR series (2002-2016) is concerned with Human Development, and is the regionally-focused version of the UN's Human Development report which was launched globally in 1990 (UNDP, n.d.). The latter introduced a new approach, developed by the economist Mahbub Al Haq based on the work of Amartya

Sen,[10] for advancing human wellbeing, which expands the richness of human life, beyond the wealth of the economy and focuses on people, their opportunities and choices (ibid). Thus, the AHDR's perspective is wider than the economic dimension:

> Arab Human Development Reports (AHDRs) engage institutions and citizens in the Arab countries in analysis and discussion about the factors which shape the choices and freedoms available to people across the region, so as to foster understanding and consensus around regional and national development priorities. (UNDP, n.d.-b, para 1)

Despite the difference in their focus, the reports share a common outline and approach. The outline consists of three main parts, starting firstly with an introduction that presents the current state and defines the problem. This is followed by an analysis of the causes of these problems, which is either presented in dedicated context/ background chapters or integrated throughout the study; and, finally; the reports end with recommended policy actions. In terms of the approach, the analysis is largely based on internally-developed frameworks that seek to explain the 'local' in relation to global comparative data, reflecting the ideological perspective of the authoring organisation. For example, the World Bank's report focuses on economic indicators whilst the AHDR focuses on its on socio-political indicators, mainly the Human Development Index, which is an unweighted average of a nation's longevity, education and income, and which is designed specifically to recognise that monetary

[10] Ideas on the links between economic growth and development during the second half of the 20th Century also had a formative influence. Gross Domestic Product (GDP) and economic growth emerged as leading indicator of national progress in many countries, yet GDP was never intended to be used as a measure of wellbeing. In the 1970s and 80s development debate considered using alternative focuses to go beyond GDP, including putting greater emphasis on employment, followed by redistribution with growth, and then whether people had their basic needs met. These ideas helped pave the way for the human development (both the approach and its measurement).

measures are inadequate proxies of development. In what follows I will focus on how each of these reports constructs educational problems, what evidence is used to validate the problem, and the recommended policy actions.

Problem and Evidence

All the reports agree in their opening statements that the Arab World is at a crossroads or a tipping point, demanding urgent attention and action in order not to be left behind in the 'global race'. They acknowledge the quantitative achievements measured by reference to indicators such as literacy and enrolment rates as well as expenditure on education. For example:

> Arab countries have made tangible progress in improving literacy: adult illiteracy dropped from 60% in 1980 to around 43% in the mid-1990s; female literacy rates tripled since 1970 … As a group, Arab countries spend a higher percentage of GDP on education than any other developing region. By 1995, over 90% of males and 75% of females [i.e. of the relevant age groups] were enrolled in primary schools, and nearly 60% of males and nearly 50% of females were enrolled in secondary education. (UNDP, 2002b, p. 3)

> At present, almost all countries in the region educate their boys and girls at the primary level, and a significant percentage of the relevant age cohorts are engaged in secondary and tertiary education. Literacy rates have been reduced significantly and some countries score relatively well on international tests, especially when the level of income and gross enrolment rates are taken into account. Moreover, most countries of the region were able to achieve gender parity at almost all levels of education (World Bank, 2008, p. 31).

These statements represent the only positive observations in the reports about the education systems in the region. They are soon followed by a summary of challenges that revolves mainly around the readiness for the 21st Century and ability to compete in the global knowledge economy:

> Much also needs to be done in order to empower the people of the Arab region to participate fully in the world of the twenty-first century (UNDP, 2002b, p. 1)

> The main finding of this report is that the MENA region has made significant strides in the education sector, having started in the 1960s and 1970s from very low levels of human capital accumulation. However, it has not capitalized fully

> on past investments in education, let alone developed education systems capable of meeting new challenges (World Bank, 2008, p. 2).

Depending on the perspective of the international organisation authoring the report, the education problem is framed by its role in a nation's development and readiness for competing in the 21st century, and these systems are portrayed as unsuited to meeting them.

The AHDR 2002 Opportunities report argues that the 'knowledge deficit' is one of the main factors obstructing human development in the region (UNDP, 2002a). The next report in the series – the Knowledge Report issued in 2003 – focuses exclusively on the knowledge deficit, and within that the education systems as key vehicles of knowledge diffusion (UNDP, 2003). This conceptualises a knowledge society as 'one where knowledge diffusion, production and application become the organising principle in all aspects of human activity: culture, society, the economy, politics, and private life' (UNDP, 2003, p. 2). Based on this definition, the report analyses the status of knowledge acquisition by evaluating the status of knowledge diffusion and production. The report takes the view that there are serious 'blocks in knowledge diffusion' resulting from what it considers the poor quality of education in the region (ibid, p.52). This is despite the fact that it was prepared at a time when only a few Arab countries participated in comparative educational international tests:

> Evaluating the quality of education in the Arab world is extremely difficult owing to insufficient information and data. These difficulties are compounded by the complete absence of any standardised measurements for comparison among Arab countries on the one hand, and with the rest of the world on the other, particularly over time. (UNDP, 2003, p. 54)

To overcome this issue, the report's authors based their analysis on specialised studies conducted in some Arab countries, admitting that these were of limited value

as they were neither designed nor conducted on a comparable basis (ibid, p.56). The report refers to the results on TIMSS of the few countries that participated in 1995 and 1999, noting their low scores. Later reports of the series emphasised scores on international tests when addressing the quality of education. The quote below from the most recent report in the series is illustrative:

> Overall, the quality of education is poor. Standardized international tests in education such as the Trends in Mathematics and Science Study (TIMSS) and the Programme for International Student Assessment show Arab countries scoring well below the average even if results are adjusted for per capita income, particularly in the rich Gulf countries (UNDP, 2016b, p. 31)

Overall, the 2003 Knowledge Report reemphasises that 'the most serious problem facing Arab education is its deteriorating quality' (UNDP, 2003, p. 52), although no evidence is provided to support the claim around the 'deterioration'. This assertion is then repeated in future editions in support of the analysis of the knowledge theme. For example the Human Security Report (UNDP, 2009) stresses the importance of revamping the quality of the education system to close the 'skills gap' and address poverty, while the Youth Report (UNDP, 2016b) continues to emphasise the need for a quality education system.

The AHDR reports dedicate large sections to the analyses and, depending on the theme of the report, to the contextual factors relating to the topic of discussion. The AHDR knowledge report analyses in depth the cultural, socio economic and political factors, concluding that 'Political obstacles to knowledge acquisition are even more severe in Arab countries than those posed by their socio-economic structures, which are in turn seen to be more obstructive than any features of culture' (UNDP, 2003, p. 160).

The World Bank's economic perspective is reflected in its assessment of the education status in the region, particularly its focus on the economic returns to

investment in education. In contrast, the UNDP reports recognise education as a cornerstone in human development. Nonetheless, both reports agree that the education systems in the Arab world, despite their quantitative achievements and high level of spending on education, lack quality. Indeed, the World Bank report takes the position that the quality of education is the missing link that stops the high investment in education from translating into economic progress in the region (World Bank, 2008, p. 48). The reports validate their view that the quality of education in the region is poor by referring to performance on international tests:

> Three such indicators are used: scores on international tests, fields of study in higher education, and literacy rates. Imperfect as these indicators may be, they provide a reasonable 'weight' that can be attached to the number of years of schooling in the labour force as an improved measure of human capital investment (World Bank 2008, p. 17).

> In the education sector worldwide, impact evaluation generally remains an infant industry and this is no exception in Middle East. We note one area where there is important progress in this regard: Middle East country participation in TIMSS and PIRLS (ibid. p. 294).

Overall, the reports argue that the poor quality of education in the region is holding it back from competing in the global race. As will be seen in the next levels of analysis, the narrative around this 'problem' is reinforced, and no other problems are raised. As a result, the general international organisation reports appear to establish the parameters of the metanarrative of the policy problem which is used in the subsequent reports. Notwithstanding the reference to the wider context in the UNDP reports, the reports use 'indicators' such as enrolment rates to assess quantitative achievements and 'international data' such as the results on ILSAs to assess quality.

Rappleye and Un (2018) argue that the focus on measurable features, such as indicators and ILSAs, allows the local contexts to be portrayed through universal categories by international organisations, 'generating a familiar view of national

contexts by applying universally applicable categories' (Rappleye and Un, 2018, p. 254). They refer to this as the 'common categories' approach to contextualisation. In this approach, international organisations implicitly project the image of common conditions as the leading causes and driving the focus away from the wider embedded factors such as the historical and cultural (ibid).

Solutions

Given the perceived problem with the quality of education, the World Bank report's proposed path for educational transformation is located within a framework that claims to maximise the returns from education and meet the new challenges; it proposes to do this by balancing *engineering*, *incentives* and *public accountability* in education whilst simultaneously reforming labour markets (World Bank, 2008, p. 117). *Engineering* refers to improving the technical relationships between the inputs and outputs of education. *Incentives* involves focusing on motivation rather than on technical coefficients, leading to better performance and responsiveness from those providing educational services. *Public accountability* is concerned with the ability of parents/students to influence the formulation of education objectives, policies, and resource allocation. Figure 4-2, reproduced from the WB report (World Bank, 2008, p. 123), provides examples of each of the framework components and possible instruments within them.

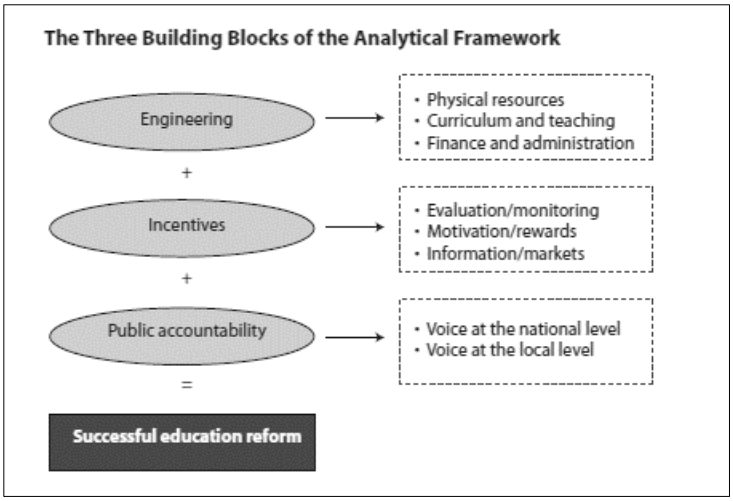


Figure 4-2 The World Bank's suggested reform framework

The report also suggests that fixing the education system is not enough. This is why a second pillar is proposed and includes two complementary components: (i) domestic labour markets, where most educational rewards are determined, and (ii) external labour markets, which can balance the excess supply of human capital in labour-abundant countries with excess demand in labour-scarce countries. The report argues that this is essential to ensure investment in education contribute to economic growth, better income distribution, and poverty reduction (World Bank, 2008, p. 283).

The UNDP's proposed solutions called for building Arab capabilities and knowledge through:

- A 100 percent enrolment rate in basic education,
- An increase in mandatory schooling to 10 years,
- Support for life-long learning,
- Tighter links between school and life,
- Improved cooperation,

- High quality education for all through giving priority to early childhood learning
- Developing adult education system for lifelong learning,
- Giving particular attention to promoting higher education
- Instituting independent periodic evaluations of quality at all stages of education.

These strategies are very closely linked to the UN's Millennium Development Goals (MDGs) and the Sustainable Development Goals (SDGs) 2030 Education agenda (SDGF, n.d.).

Both reports identify the same educational policy problems across all countries and offered very similar solutions to the problems identified in the region. The proposed solutions, moreover, were identical for all Arab countries despite the political, socio-cultural and economic differences between them. In the next section, I analyse the self-funded policy analysis reports produced by members of the GEI operating in the region and demonstrate similarities between these and the reports discussed so far.

Level 2: Self-funded Policy Analysis Reports

This level of analysis focuses on reports published at the regional level by commercial agencies, including consulting firms. These have similarities with the reports analysed at the previous level, they, are not commissioned; they are self-funded, published voluntarily, and focus explicitly on education in the Gulf region. Whilst providing an analysis of the region, they also serve to highlight the publishing organisation's expertise. The Gulf is one of the largest and fastest-growing markets for consultants in the world. As a result, there was a large sample of documents to be considered for analysis at this level. A preliminary review revealed that there are two types of reports concerned with education. The first offers an evaluation of the education sector as a potential investment, (e.g. Alpen Capital, 2018; Ardent Advisory & Accounting, 2015; Hoteit *et al.*, 2018), while the second group falls under the theme of policy analysis. This section will draw on the literature in the latter group. To limit the sample to a manageable size, I will focus on reports published by firms that were subsequently appointed by Gulf governments to reform their education systems.

In comparison with the reports analysed in the previous section, the reports at this level are shorter and focus explicitly on education. They mirror the narrative and line of argumentation found in the previous level. Education in the region is placed in a critical moment of time when urgent action is necessary, and it is argued that education systems in the Gulf States lack quality. This lack of quality is presented as a major challenge holding them back from competing in the global race. In the sections below, I analyse the reports listed in Table 4-1 following the same approach as I used in the previous section.

The first report was published by McKinsey and Company, a leading management consultancy firm that works with public and private institutions in a number of different sectors (McKinsey & Co., 2019c). The firm has a dedicated education advisory team and claims to:

> have completed 220 projects, including more than 10 national and 20 regional system transformations. Our work has delivered impact for 400,000 schools, 3 million teachers, and 60 million students (McKinsey & Co., n.d.-b, para. 4).

The firm also established an internal think tank in 1990, McKinsey Global Institute, which conducts research on major challenges and trends affecting the world. Its research output features in a number of their publications including *The Quarterly* which, it is claimed,

> combines powerful insights from McKinsey with ideas from other world-leading experts and practitioners to help readers stay at the cutting edge of management thought, become more effective leaders, and boost the performance of their organizations (McKinsey & Co., n.d.-a, para. 1).

The report I analysed at this level appeared in the 2007 special edition titled '*Reappraising the Gulf*'. At the time of its publication, McKinsey was involved in advising Bahrain's government on economic and educational reform.

The second report analysed in this section was published by RAND, a think tank specialising in public policy research and analysis. The think tank has a dedicated education unit, RAND Education, comprising more than 50 experts working in US and countries in Europe, the Middle East and the Far East on educational reforms (RAND, 2007, p. 8). The report was published in 2010, and focussed on the role of education in preparing graduates for the labour market in the

GCC.[11] Just as he McKinsey report was published at a time when McKinsey was working with Bahrain's government, so the RAND report appeared when that organisation was assisting the Qatari government in implementing a reform of its K-12 system. In addition to these reports, I will also make references to other reports from consultancies and think tanks operating in the region to demonstrate the similarity in the approach. The reports at this level are illustrative of what Stone (2007) describes as 'activities that help amplify their policy analysis and sometimes propel their products into decision making'. By disseminating their ideas, these actors are using marketing strategies to create demand for their services (Dwyer and Harding, 1996; Saint-Martin, 2012).

The depictions of context in the RAND report appear in the introduction and focus largely on the global context where the knowledge economy, rapid pace of technological change, and the interdependent global economy are portrayed as requiring a workforce with the capacity for leadership, problem solving and collaboration in a wide range of economic sectors. The report presents the purpose of education as 'preparing individuals for the labour market' (Karloy, 2010, p. 1). It draws heavily on the works of Hanushek (2002; 2000) focusing on the economic return of investment in education, and argues that theoretical assumptions and empirical evidence support the claim that education plays a role in the labour market through its contribution to skills formation. Thus the goal is to create an education system that supports human capital development. The RAND report refers heavily to the UNDP and World Bank reports analysed in the previous section, and includes an

[11] This paper was prepared for the 15th annual conference of the Emirates Centre for Strategic Studies and Research on 'Education and the Requirements of the GCC Labour Market' held on February 1–3, 2010 in Abu Dhabi, United Arab Emirates.

academic literature review section on human capital; this is not the case in the McKinsey report which does not refer to the context or any external academic resources. This appears to differentiate the analysis conducted by think tanks, who include a literature review to give their work academic credibility, and the analysis of commercial management consultancy firms.

Problem and Evidence

Both reports mirror the narrative of the texts analysed at the generic regional level in which – it was argued – the significant quantitative achievements in education in the Gulf were not sufficient for the 21st century, and that it was imperative for policymakers to focus on the quality of education. For example, according to McKinsey:

> Having largely achieved the once-distant goal of providing free access to primary and secondary education for all nationals, the GCC now faces a much thornier challenge: raising the quality of that education (Barber, Mourshed and Whelan, 2007, p. 39).

The report supports the claim of poor quality by references to student performance in international national tests:

> But poor showings on the most recent global standardised math and science tests (TIMSS) served as a wake-up call for the GCC policymakers. The national assessments that followed have only confirmed those results (ibid, p.39).

The report prepared by RAND echoes the statements made in the McKinsey report and notes that, while the Gulf States have increased investment in human capital and achieved near universal enrolment rates and closed the gender gap (Karloy, 2010, pp. 32-33), there remain concerns around continuing the growth in educational attainment, improving the quality of education, and addressing labour market imbalances. The issue of assessing education system performance was also seen as

something that needed to be addressed to ensure returns on investment in education (ibid, pp. 33-36).

RAND relies heavily on UNESCO and WB data to support the findings on enrolment, gender parity and education achievement. However, they acknowledge that such data does not provide any indication of the quality of education received, thus to gain insight into the issue of quality the report turns to ILSAs, drawing in particular on the results of TIMSS, PIRLS and PISA (ibid, p. 19), reinforcing the emphasis placed on these international tests.

Solutions

The McKinsey report maintains that the policymakers in the Gulf should now focus more on *outputs*, not *inputs*, mirroring the World Bank's proposed framework, which was examined in this chapter under the first level of analysis. McKinsey focuses on two areas; first, increasing the quality rather than the quantity of teachers and, second, installing robust performance management. According to the report, international evidence from TIMSS suggests that low student-teacher ratios correlate poorly with strong student performance. Referring to interviews with policymakers in the Gulf and historical data, the report notes that the strikingly low student-teacher ratio in the Gulf makes it easy to measure and manage the performance of teachers (Barber, Mourshed and Whelan, 2007, p. 43). It recommends that, in order to raise the quality of teachers, Gulf States must focus on attracting and admitting higher-calibre teaching candidates and on improving education and training for candidates and teachers. Moreover, the report stresses that this is only part of the answer: the Gulf States need transparent performance management systems to ensure that students learn the 'right' knowledge and skills, that teachers perform well, and that

schools are properly managed by examining student outcomes and assessing the performance of schools.

The RAND report observes that the Gulf States need to address four challenges and offers what it claims to be research-based solutions for each. Despite the near-universal access to education, according to the report, the Gulf States need to continue the growth in educational attainment and to pay attention to ensuring that children enter school once they reach the eligible age as well as avoid repeating grades. To this end, the report recommends providing high quality early childhood education, starting one or two years before the mandatory school starting age. The report argues that, based on the results of TIMSS, PIRLS and PISA, the quality of education is a significant concern and that the priority needs to be to reform the education system, from the content of the curriculum to the instructional approach to the duration and intensity of time spent in school. Moreover, efforts at reform need to recognise that boys have even further to go to reach international standards than girls. Similarly, the quality of post-secondary education also needs to be addressed, particularly gender-related issues. The report also focuses on addressing the labour market imbalances, including the underutilisation of female nationals and the overall high level of unemployment especially amongst those with more education. Recommending labour market reforms to complement the proposed education reforms in order to create a virtuous cycle, the report suggests that raising education quality at all levels would be expected to make nationals more attractive in the labour market and thereby boost participation rates, reduce unemployment rates, and raise productivity and hence wages. With increases in the rewards for more education because of increases in education quality, students in turn would see the advantages of making investments in their education. Finally, the report stresses the need to

provide data to assess the performance of education systems and labour market outcomes to inform policy. In this, the report argues that the Gulf has been collecting data but the issue is less one of having the data on hand, but rather a need to make the data available for research and analysis with results that are made publicly accessible.

These two reports are representative of similar publications produced by commercial GEI agencies operating in the Gulf. Selecting any other report available online (see for example Booz & Company, 2008 and Ernst & Young, 2016) reveals a common approach to problem definition: economic framing, using international comparative data such as economic indicators and results on international tests, and proposing similar solutions that focus on outputs running in parallel with labour market reports.

Level 3: Commissioned Reform Reports

This level of analysis focuses on the reports that were prepared by international organisations, consultants and think tanks commissioned by Gulf States to assess their educational systems and recommend reform strategies. There is a range of types of agencies, from non-profit think tanks to commercial management consultancy firms. I will refer to them collectively as 'consultants' based on the nature of their involvement where consulting services were provided for a fee. The reports analysed at this level, listed under Level three in Table 4-1, were all prepared in response to a government request; however, it is important to distinguish between the types of requests and consequently reports that were produced. The first comprise responses to a request for a proposal to diagnose the education system and recommend reforms. The second are responses to requests to evaluate the progress of implemented reforms.

Access to 'request for proposals' (RFPs)[12] is very difficult to obtain for two reasons. Firstly, these documents are sensitive and rarely shared as they include data used for competing during the tendering process, and could reveal confidential information (e.g. previous clients' data). Secondly, none of the consultants participated in an official tendering process at the time; most were directly invited by the monarch or heir apparent or appointed as a continuing arrangement from a previous project. This point will be elaborated on in Chapter 6. Nevertheless, the reports analysed in this section reflect the initial proposals of the consultants and are considered to be the best available documentation of the reforms.

[12] A request for proposal (RFP) is a document that solicits a proposal, often made through a bidding process, by an agency or company interested in procurement of a commodity, service, or valuable asset, to potential suppliers to submit business proposals.

I analyse the approach to educational reforms in each of the Gulf States in greater depth in Chapter 6, in this chapter I will focus on the depiction of 'context' to analyse how the educational policy problem is framed and consequently constructed. I explore the evidence used to validate the consultants' arguments, and discuss very briefly the solutions proposed in order to demonstrate how this level is related to the previous two. Direct access and permission was required to obtain reports from each of the Gulf States; I did not manage to obtain this for Saudi Arabia and the UAE, so I did not continue to explore these countries in the chapter. For its part, Kuwait is not known to have a proposal report or an in-depth context analysis:

> In Kuwait, which has huge oil revenues, the cabinet in 2003 adopted the 'Education Development Strategy 2005-2025,' and there is talk of other initiatives, but apparently without trying to approach educational problems in depth or apply experiments as extensive as those in the UAE and Qatar (Sakr, 2008, para. 6).

In this chapter, therefore, I focus on three reports from Bahrain, Oman and Qatar. The reports relating to Bahrain are not publicly available but they were shared with me for the purpose of this research, whilst the reports about Qatar and Oman were publicly available.

Commissioned proposal reports

Bahrain

McKinsey was appointed by the EDB to 'diagnose' Bahrain's education system and develop a reform strategy accordingly. The report documenting Bahrain's school reforms was published in 2006 (EDB, 2006). A subsequent report focusing on the 'second wave' of reforms was published in 2008 (EDB, 2008a). Combined, these two publications are the most comprehensive reports produced between 2005 and 2010, which was the reform period in Bahrain.

The Bahraini context is addressed very briefly in the introduction section of the 2006 report, and focuses on two economic factors – the dependence on oil and the capacity of the public sector to create jobs for Bahrainis. The report argues that, despite the 'impressive development of Bahrain's education system, it falls short when measured against the needs of the 21st century' (EDB, 2006, p. 4). The report highlights the importance of economic productivity, noting that Bahrain's productivity is growing at a rate lower than the world's average. Without analysis of other contextual factors that could explain this low rate, it establishes an explicit economic frame that portrays the education system as one not prepared for the 21st Century. The subsequent reform document, published in 2008, is a continuation of this report and makes no reference to context (EDB, 2008a).

The latter report makes observations about what it considers problematic elements in the education system. It notes, for example, that the MOE staff are engaged in bureaucratic due-process or reactive fire-fighting, and that this needs to be changed to strategic action (EDB, 2008a, p. 10). However, the report refrains from commenting on any contextual background that could have explained the behaviour of MOE staff. When senior policy makers and consultants were asked in interviews why the diagnostic phase did not include a comprehensive analysis of the local context, a typical response was as follows:

> Many previous attempts explored these issues. We didn't need to reinvent the wheel, and we needed action (Interview with Consultant 4, 24/11/2016).

A substantial part of the report presents the findings of the diagnostic by comparing MOE data with results on TIMSS to illustrate the relatively poor performance of Bahraini students. The 2006 report concludes with lessons from top performing systems that should be emulated in Bahrain. The proposed first wave reform

initiatives prioritised improving the quality of teachers and the management of the school system's performance through independent quality assurance arrangements.

Oman

The World Bank has been a key partner in establishing and developing the education system in Oman since the 1970s. The Omani education reports are available online, and the most recent was published in 2012 and developed jointly by the World Bank and the Omani Ministry of Education (World Bank, 2012). The report documents the analysis carried out by the World Bank to analyse the strengths and weaknesses of the Omani education system and to provide recommendations for future reforms.

As with the reports analysed in the previous levels, this report begins by highlighting quantitative achievements:

> Oman's recent successes in expanding education provision are impressive. School enrolments have grown from 900 in 1970 to over 600,000 in 2008/09, and repetition and dropout rates have decreased considerably. The result is that education participation levels in Oman are equal to or above other countries in the Middle East and North Africa (MENA). In particular, young women in Oman have high levels of tertiary education completion similar to levels in top performing countries, such as Singapore and South Korea. The Government has now moved its focus to the quality and relevance of teaching and learning. The results of the analysis from this education sector study confirm that the key challenge facing the education sector in Oman is to improve the quality of student learning outcomes and that enhancing quality should be the Government's main priority in education (World Bank, 2012, p. 23).

However, unlike McKinsey and RAND who were appointed recently, the World Bank had worked with the Omani government on previous diagnostics and reforms. This is reflected in a section in the report that commends the previous reform attempts:

> Recent endeavours to improve quality include the introduction of revised systems of basic education (grades 1–10) and post-basic education (grades 11–12). While these initiatives are still new and their results will not be entirely apparent for several years, recent national and international assessments of learning achievement highlight the need for a concerted effort to improve quality (ibid).

The report begins with a dedicated chapter that provides overviews of the demographic, economic and social contexts. However, as with the Bahraini report, it establishes a strong economic framing for education reform in Oman:

> Maintaining the momentum of this remarkable economic growth and increasing Oman's competitiveness internationally will require further development of Oman's human capital. This development is a high national priority in which education plays a central role (World Bank, 2012, p.29)

Thus, instead of an impartial in-depth analysis of context, the chapter presents Oman's context within a purely economic frame, and through a human capital lens. The chapter portrays, as the background of the study, a growing youth population in Oman that is undergoing a transition, with an increase in male non-Omani workers. Oman is portrayed as pursing diversified industrial economic policies, with the government focused on developing human capital, but expatriate workers continuing to dominate the private sector jobs despite efforts to nationalise the private sector labour market. The report points to Oman's improved performance on the UNDP's HDI and commends the remarkable adult literacy rate achieved. It also provides a brief description of the Omani education system through overviews of governance structures, the educational ladder and reforms preceding the report.

Whilst the report does not consider that there is a crisis in education, it does point to the deficit in quality as measured by performance on international assessments:

> While these initiatives are still new and their results will not be entirely apparent for several years, recent national and international assessments of learning achievement highlight the need for a concerted effort to improve quality. (World Bank, 2012, p. 23)

The report prioritises certain areas to improve the quality of education in Oman. The first is to establish a culture of high standards, and the second, to develop strong pedagogical skills because 'An effective teaching force with strong pedagogical

skills is the key to increasing education quality' (World Bank, 2012, p. 25). In addition, the report identifies areas of focus that are related to the EFA goals including early childhood education, children with special needs and adult literacy.

Qatar

K-12 reforms in Qatar were designed and implemented by RAND and, in this section, I analyse their main report titled '*Education for a new era*' (Brewer *et al.*, 2007). The report, published in 2007, includes a comprehensive record of the reforms the think tank oversaw between 2001 and 2007. Unlike the McKinsey report, which covered the Bahraini context in a few paragraphs, the RAND report dedicated the second chapter (25 pages) to the Qatari context, focusing on the historical and political background, as well as economy, the population, the workforce and the education system (Brewer *et al.*, 2007, pp. 7-30). As with the Omani report, the purpose of this background chapter is clearly stated as:

> It is essential to have some understanding of the Qatari context to understand the reform that was designed and implemented by RAND. (ibid, p.7)

The quote above demonstrates how the authors limit the purpose of the background chapter to provide an understanding of the context as a prerequisite for the reforms instead of conducting a comprehensive in-depth analysis of the context in general.

The historical and political section presents Qatar as if to a reader unfamiliar with the state. It covers topics like geography and climate, and describes how Qatar transitioned from a tribal society into a modern state under the Al-Thani rule as a British protectorate. The section on economy describes the role of natural resources in Qatar's rapid development. However, in contrast to Bahrain and Oman, which both have modest natural resources reserves, it does not emphasise the danger of the unsustainable reliance on oil and gas because Qatar is at less risk of this. The next

section recognises how public sector employment has become a source of wealth distribution and the reliance on foreign labour, which RAND attributes to the lack of willingness and capacity of the local workforce.

RAND presented its finding as a 'confirmation of weaknesses' (Brewer *et al.*, 2007, p. 37), a reference to the Emir's initial concerns. The report presents the problems of the education system as resulting from the MOE's lack of vision and innovation, the out-dated and unchallenging curriculum, the lack of autonomy at school level and poor infrastructure, as well as the poor incentives and training opportunities for teachers. The report urges the leadership to consider structured and systematic change in order to build a 'world-class' K-12 education system, focusing on managing the outputs of the education system and development of educational standards to measure the performance of the education system. The proposed solution is similar to those proposed by McKinsey in Bahrain and the World Bank in Oman.

Commissioned progress reviews

The same consultants were also asked to evaluate the progress of the implemented reforms. It is only then that they portrayed local contextual factors as extending beyond the economic framing. Factors that were ignored, downplayed or included as neutral observations in previous reports are now called on to explain elements of the reform that did not progress well. In 2005, for example, the Qatari leadership asked RAND to evaluate the implementation of the Qatari reforms which they had proposed. Their findings, published in 2009, claimed that the reforms had produced a number of positive effects in that short time, but there were a number of concerns that the Qatari leadership needed to address, namely:

- Limit policy changes
- Increase Support for Schools and Teachers
- Review Student-Assessment Policies, Particularly those Related to the Use of English as the Language of Instruction and Testing
- Adopt Approaches That Encourage Parents to Support High-Quality Education for Their Children (Zellman *et al.*, 2009, pp. xix-xxii),

Subtly, the report suggested that the issues underlying implementation of reforms stemmed from local factors. The quote below illustrates how responsibility was shifted away from RAND to the Supreme Education Council (SEC):

> The SEC has tried to communicate the positive aspects of the reform, but debate about the reform and its achievements continues in the popular press. The supply of Independent schools and other high-quality school spaces has not kept up with demand, so market forces are not imposing accountability on school operators as the reform design intended. The SEC has also instituted a number of new policies that reduce operator autonomy and variety. (ibid, p. 60)

I observed similar claims that shift the blame towards the local context when analysing progress review reports in other Gulf countries. For example, the World Bank in Kuwait attributed some of the challenges to the frequent changes in administration and lack of local talent. The outcomes of the educational reforms in the Gulf States and the related challenges of enactment are analysed in more detail in Chapter 7, and this will demonstrate in more detail how the GEI actors use the local context to explain failure of delivery.

4.5 Discussion

The analysis reveals how GEI actors used the 'context' as a framing device to influence the ways in which the educational policy problem was defined and consequently addressed. Politicians have long used framing as powerful tool of advocacy. However, as the analysis reveals, the GEI actors are now employing framing as a marketing tool.

As demonstrated above, **the first level generic regional** reports established the parameters of the metanarrative evident at the subsequent levels of analysis; the first level documents consider a wider range of contextual factors, especially in the reports published by the UNDP, which included dedicated chapters analysing political, economic, cultural and social factors. However, when addressing education explicitly, the economic context takes centre stage. The reports rely on international comparative data and rely on comparisons using quantitative indicators. This has been identified as a 'common categories' approach in contextualisation (Rappleye and Un, 2018, p. 254). In using this approach, international organisations implicitly project the image of common conditions, and portray them as leading causes as well as driving the focus away from the wider embedded factors such as the historical and cultural. The danger of doing this eliminates *from the outset* identifying variables unique/specific to a particular context. Thus, the problem defined at this level revolved around the poor quality of education and its consequent effect on the region's ability to compete globally. Subsequently, the proposed policy solutions are also standardised across the countries, ignoring the local context.

At the second level, the **self-funded policy analysis reports** prepared and published by commercial actors, mirrored the metanarrative presented in the generic regional reports. The analysis of these reports reveals a narrower approach to

contextualisation where, in most cases, the context appears as a paragraph at the beginning of the report and focuses on measurable socio-economic indicators to construct a crisis that requires immediate attention and relies heavily on global comparative data to substantiate the argument. The reports at this level are illustrative of the marketing strategies used by consultants and commercial GEI actors in create demand for their services (Dwyer and Harding, 1996; Saint-Martin, 2012).

At the third level, the analysis of the **commissioned reform reports** revealed that, when the same commercial actors involved in disseminating self-funded policy analyses are hired and requested to submit a proposal, their portrayal of local context becomes narrower and more concentrated on economic factors. Yet, when asked to evaluate the progress of their proposed reforms, they widen the focus to capture other contextual factors. The reports at this level mirror how the policy problem is defined at the two previous levels, namely harnessing the data of international organisations and proposing solutions similar to those proposed in the first and second level reports. The reasons presented in the 'review of progress' reports to explain the limited success of reforms demonstrate that the contextual factors that were initially downplayed took centre stage to explain the sources of failure.

The documents analysed at these three levels appear to work in a complementary manner. The first defines the metanarrative and collects measurable indicators which are subsequently harnessed by commercial actors to propel their solutions. The analysis also confirms how depictions of context, especially in defining educational problems, are narrowed down significantly to focus on the economic factors in reports analysed at the second and third level.

In the next chapter I present a perspective that departs from the GEI's use of context as a framing device, and analyse in greater depth the range of factors embedded within the societies of the Gulf that were downplayed or silenced in the GEI's depictions of 'context'.

Chapter 5 **Beyond the GEI's Conceptualisation of Context**

In the previous chapter, I analysed the reports of the GEI and showed how a wider array of contextual factors which was considered in the *generic regional reports* analysed at the first level, subsequently disappeared from the *self-funded policy analysis* and *commissioned reform reports* analysed at the second and third levels. In this chapter, I continue to answer the first research question: **What are the 'contexts' of educational policymaking in the Gulf States?** I extend the analysis in the previous chapter by broadening my focus beyond the GEI's framing and revisit the contextual factors that were identified in the reports at the first level and downplayed or ignored in the reports analysed at levels 2 and 3. I do this by contrasting the analysis of the political, economic and social contexts of the Gulf States in academic literature with the analysis in the GEI reports, and draw on my interview data. Because the region was addressed as a whole in most of the reports, my analysis focusses on levels 1 and 2, and I organise the analysis around the common factors that characterise the Gulf. These include:

- History and state formation,
- Political structures,
- Bureaucracy and policymaking,
- Population and demographics,
- Sociocultural factors such as religion and language.

I follow this with a brief analysis of the differences that mark the Gulf States out from one another. These differences result either from the commonalities discussed in the previous section manifesting in different degrees at the individual state level or from unique historical and geographical factors. I do this to illustrate that at the local level, several critical factors were not considered in the GEI reports analysed at

levels 1, 2 and 3 in the previous chapter, and these had implications for the educational policymaking process and the reforms. It is important to note that this chapter is not aimed solely at identifying the nature of the commonalities and differences; rather, I consider how they relate to the policymaking in the region, especially in terms of policy transfer and the reliance on the GEI. In doing so, I do not intend to provide a comprehensive account of the individual Gulf States, nor of the region as a whole, but I draw attention to a silent context that affects educational policymaking in the region. I argue that extending the analysis of 'context' beyond the GEI's framing could explain 1) the region's reliance on the GEI and its receptiveness for policy transfer, and 2) the constraints to realising the aims of the educational reforms.

Before I begin my analysis, I will start this chapter with an anecdote that reflects how 'local' contextual matters were treated during the early stages of the educational reform planning in Bahrain. When I was working in the education reform PMO in Bahrain, alongside the team of McKinsey consultants, we used to celebrate the end of every phase of the educational reforms with a specially-produced memento. At the end of the strategy development phase, when the due-diligence trips and the analysis of the diagnostic results had finished, the team produced a coffee mug with memorable statements collected during the phase. That mug sat on my desk for 8 years! I occasionally explained to visitors what it represented, unaware of how the anecdotal statements printed on the mug represented a fundamental issue with the diagnostic study and the approach to the understanding of its context. I will choose one statement to illustrate how certain important contextual factors were downplayed. The statement represented a question raised by a Bahraini member of a working team, who was representing the private sector, during a benchmarking trip

to one of the Australian universities. The question was: ‘so you can’t just appoint your cousin to be the president of the university?’ which he asked at the end of the presentation by the Australian university president. At the time this was an awkward question, because he was sitting next to the president of the University of Bahrain, a member of the Bahraini delegation and a member of the royal family, i.e. the Monarch’s cousin. The Australian university president did not know what was meant by the question, and the other members of the Bahraini team were taken aback its bluntness of the question. Swiftly, that question was dismissed when another team member asked a different question. The question was memorable amongst the accompanying team of consultants, and immediately qualified as an anecdote for the coffee mug.

This is not to say that the President of the University at the time was not qualified, but it illustrates how senior level appointments are perceived to be based on political loyalties, an underlying ‘cultural’ feature in the Gulf States (UNDP, 2003). The question reflected a genuine issue: who gets appointed in senior positions and why. The mug from that phase featured more such anecdotes which reflect a contextual factor crucial to the analysis of the policy problems but dismissed by the consultants as just an anecdote ignored in their reports. These anecdotes represent what Rappleye and Un (2018) term as ‘contextual clichés’: in analysing the approach to contextualisation by the World Bank, they maintain that:

> such contextual clichés are virtually non-existent in official Bank publications since the 1980s and our own experience did not find serious evidence that such ‘folk understandings’ play any major role in key Bank planning decisions (Rappleye & Un, 2018, p.254).

The quote above about how the World Bank treated ‘folk understanding’ and ‘contextual clichés’ resonates with the story above which gives an example of a local

understanding that was dismissed as an anecdote or a cliché, but was critical to the policy analysis. Below I elaborate on this by revisiting the dismissed contextual factors and argue that these serve to explain the reliance on the GEI and policy borrowing as well as explaining the constraints of their approach.

5.1 Analysis of Contexts Beyond the GEI's Framing

History and State Formation

No proper understanding of the contemporary Gulf States can be obtained without a reflection on their historical formation, which has arguably 'caused aspects of pre-colonial or pre-modern societal conditions to be perpetuated in the twenty-first century as the fundamental political structures for sovereign states' (Heard-Bey, 2016, p. 389). Due to facts of geography, the Gulf region has always been a commercial and a strategic asset entangled in regional and foreign ambitions. The six Gulf States in their present form are creations of the twentieth century (Peterson, 2016). However, this does not mean that these states were manufactured purely by colonialism. Ayubi (2009) argues that the nucleus for the 'states' predates the colonial presence: at that time the principal political unit was the tribe (Peterson, 1977). The colonial powers were instrumental in drawing up the boundaries in their present form and directing economic relations towards Europe (ibid). The Gulf States were not formal colonies, but the British interest in securing trade routes through the region resulted in 'trucial'[13] and protection treaties signed by the ruling tribes in the UAE, Bahrain, Kuwait and Qatar, making them protectorates. Oman and Saudi

[13] From the maritime truce made in 1835 between the British government and several Arab states of the Oman peninsula, under which the government of Great Britain formally assumed responsibility nominally in an advisory capacity.

Arabia escaped formal foreign rule but fell into the informal political and security orbit of the United Kingdom and (after 1945) of the United States (Held and Ulrichsen, 2012). However, whilst the Gulf States share a form of colonialism with the developing world, they collectively also share a distinctive common feature in their path to state formation (Hertog, 2016). The gradual handover of power exempted them from witnessing a revolution or national moment (ibid). Heard-Bey (2016) maintains that:

> The events that led to the creation of the UAE, Qatar and Bahrain as sovereign states were completely divorced from the situation in the Gulf at the time. They stemmed from the Labour government's internal party conflicts about the costs of keeping British forces stationed east of Suez. On 16 January 1968, Prime Minister Harold Wilson announced in Parliament that all forces would be withdrawn from the Gulf by the end of 1971. (Heard-Bey, 2016, p. 300)

The Gulf States remain deeply tied to Britain, their previous protector. The British connection is not just political in nature but includes many other aspects: for example, Britain's role in Bahrain expanded beyond the original protectorate relationship to an engagement in the way Bahrain was governed (Kinninmont, 2011). Under the British protection period, British officials were appointed as advisors and administrators, for example, Charles Belgrave became a financial advisor and state treasurer in Bahrain (ibid), and in effect played the role of Prime Minister; the models of governance he established in Bahrain were considered role models in the region (Saif, 2016). Similarly, the UAE's trucial council, created in 1952 under British auspices, continued to be chaired by the British political agent until 1965 (Davidson, 2011a). This council later evolved to become the UAE's Federal Supreme Council.

The nature of this influence by foreign powers and their legacy fostered a positive outward-looking mentality amongst the ruling families (Held and Ulrichsen,

2012). This arguably contributed to the continued reliance on foreign advisors, which persists today.

> In the early years of development, the Gulf States relied heavily on British advisers, contract government officials, business managers, construction companies and imported goods. The British influence remains predominant in such widely variegated aspects as the reliance on British expatriates, the widespread use of English and traffic organisation. Britain remains a favoured destination for Gulf students in higher education and for investment by Gulf nationals and governments alike. The rulers of the Gulf and their families value their connections with the British royal family. (Peterson, 2016, pp. 8-9)

Saif (2016) argues that in postcolonial times, the Western obsession with improving the recently independent 'developing countries' created a demand for 'development experts' promising blueprints for modernisation. The Gulf States welcomed this involvement because of their positive relationship with Britain and the US and because they were eager to modernise.

The history of the Gulf States and their path to state formation are not discussed in any of the GEI reports. However, the AHDR 2003 Knowledge Report, which was analysed as *generic regional report* at the first level in the previous chapter, appealed to the knowledge contribution of the Arabs and Muslims in the 8th Century to establish a sense of loss:

> Nevertheless, history tells us that Arabs, in previous epochs, contributed substantially to the production of knowledge and by extension to enriching the global stock of human knowledge (UNDP, 2003, p. 42).

By appealing to these historical achievements, the authors of the report establish the policy narrative, highlighting a 'story of decline' that recounts past achievements. The authors then skip to recent times and focus on reclaiming the role of the Arabs in knowledge contribution for the modern knowledge economy. This reinforces the importance of narratives in the GEI's approach to framing and suggests that through their proposed recommendations, Arabs can reclaim their position in knowledge

creation, this has been identified by Auld (2016) as the 'story of control' and it is closely related to Stone's (2012) argument around the purpose of causal stories in policy narratives. However, the GEI's *self-funded and commissioned reports*, analysed at levels 2 and 3 in the previous chapters, did not discuss any such historical aspects.

Political Structures

A prominent common characteristic shared by the Gulf States is the form of government; all six Gulf States are monarchies. Much of the early analysis about the Gulf States and their political structures anticipated that these states were artificial and weak in their creation, and consequently predicted their failure (Luciani, 1990b). However, the resilience of the postcolonial states stimulated interest amongst political science scholars to understand their persistence, especially as it runs against a dominant analytical tradition in the field 'where such regimes are considered "an anachronism in the modern world of nations"' (Yom and Gause III, 2012).

Political scientists and economists argue that oil has had a negative impact on levels of democracy, where 'oil production appears to have a strong and decisive influence on the nature of the state' (Beblawi, 1990, p. 70). Such logic underlies the political economy theory of the 'Rentier State', which seeks to 'explain state society relations in states that generate a large proportion of their income from rents, or externally-derived, unproductively-earned payments i.e. oil and gas exports' (Gray, 2011, p. 1). The theory gained prominence when Beblawi (1990) revisited Mahdavy's (1970) concept of a rentier economy. Beblawi (1990) maintains that a rentier state is characterised by an economy which relies on substantial external rent, thus the creation of wealth is centred on a small fraction of the society; the rest are

engaged in the distribution and utilisation of this wealth, the corollary of this is that a rentier state's government is the principal recipient of the external rent. Beblawi further argues that this last characteristic is of paramount importance in affecting the role of the state in the society:

> The role of the government as the principal recipient of the external rent is closely related to the fact that only few control external rent. In fact, the economic power thus bestowed upon the few would allow them to seize 'political power' as well, or else induce the political elite to take over the external rent from them without major political disruption (Beblawi, 1990, p. 88).

Similarly Luciani (1990a) uses the concept of the 'allocation state' to describe a state that allocates income that it receives from the rest of the world. In a rentier or an allocation state, income is accruing from abroad, which frees the state from the need to raise income domestically through taxation. The consequence of this is that the state is autonomous from society (Gray, 2011). This rentier state theory, despite its out-dated underlying assumptions, remains a popular theoretical lens through which to interpret politics in the Gulf and has been in widely used and routinely cited by scholars. Political scientists claim that a form of a rentier social contract (Hertog, 2009) was established in these countries where the ruling elites traded political rights for economic benefits financed by hydrocarbon revenues.

The stability of the Gulf monarchies during the so called 'Arab Spring'[14] in 2011 challenged the continued predictions of the demise of Gulf monarchies (see for example Davidson, 2013). This revived interest amongst scholars seeking to explain the resilience that:

> defied theoretical expectations that many analysts have and reversed the decades-long consensus …. they contend that inherent cultural and institutional

[14] A series of uprisings that swept the Arabian countries in 2011.

> forces make such regimes more durable than their republican peers (Yom and Gause III, 2012, p. 77).

This resilience influenced a number of studies that have rejected earlier perspectives that predicted the demise of the Gulf monarchies. Gause III (2013) and Menaldo (2012) argue that, in addition to the historical and cultural variables, the Arab monarchies' persistence is based on 'upgrading strategies' that guarantee the survival of their rule. Heydemann (2007) maintains that these strategies, which 'the rulers have adapted by reorganising strategies of governance to adjust to new global, regional, and domestic circumstances' (ibid, p. vii), include: appropriating and containing civil societies, managing political contestation, controlling new communications technologies and diversifying international linkages, and capturing the benefits of selective reforms. Heydemann argues that 'elements of these features are ubiquitous throughout the Arab world, although the particular mix differs from case to case' (ibid, p. 5). In the Gulf States, given their distinct political economy, the strategies of diversifying international linkages and capturing the benefits of selective reforms (especially in education) are most visible and will be illustrated later in this chapter.

Similarly, Gray (2011) argues that rentier state theory was over-ambitious and problematic. He argues that changes since the 1970s, like state maturity, globalisation, development policies, population and employment pressures have changed the context of rentierism and its characteristics (Gray, 2011, p. 19). Consequently, he proposes a late rentierism theory, in which the state through its political elite 'develop a more nuanced, engaged and complex approach to society and to policymaking, even if its fundamental reliance on rents to underwrite these changes remains' (ibid, p. 37). In other words, these countries are made responsive to

domestic and external pressures to liberalise, not only economically, but also politically. Abdel-Moneim (2016) argues that the educational reforms that emerged in the Gulf are an example of such 'updating strategies', describing these as 'soft areas' of reform that stop short of democratic openness, and that this is a tactic to reinvent the social contract.

The *generic regional reports* analysed at level 1 in the previous chapter recognise the key role of the political economy context and its relevance for knowledge creation and dissemination in the region. The UNDP's 2003 knowledge report explicitly addressed the issues of the rentier economy model:

> One of the main features of the production pattern prevailing in Arab countries, which influences knowledge acquisition, is a high dependence on the depletion of raw materials, chiefly oil, and reliance on external rents. This rentier economic pattern entices societies to import expertise from outside because this is a quick and easy resort that however ends up weakening local demand for knowledge and forfeiting opportunities to produce it locally and employ it effectively in economic activity. (UNDP, 2003, p. 9).

The report highlights the key role of politics in directing knowledge and influencing its development, noting that knowledge conflicts in the Arab World are versions of the political conflicts. In other words, the report claims that the absence of democracy impedes the growth of knowledge in the Arab world, for example:

> Oppression, the arbitrary application of laws, selective censorship and other politically motivated restrictions are widespread. They often take the form of legal constraints on publications, associations, general assemblies and electronic media, which prevent these from carrying out their communication and cultural roles. Such restrictions also obstruct the diffusion of knowledge and the education of public opinion (UNDP, 2003, p. 11)

The last two quotes represented an awareness of the underlying political and economic factors that did not filter down to the *self-funded analyses and commissioned reports* analysed at levels 2 and 3 in the previous chapter. The literature review on the work of consultants in the second chapter highlights that

expertise should be viewed as politicised (Bock, 2014), and not neutral:

> experts, far from being neutral sages, have their own political and economic incentives and agendas (Jones, 2018, p. 9)

Consultants are aware that in the interest of their tenure in the region, and that some aspects of the context should not be addressed directly:

> When we define context, traditionally consultants, let's just say consultant A from the UK comes to Bahrain and he is asked to do a feasibility study, to build a contextual landscape analysis of Bahrain's education system, they will say there is a population of 1.4 million and this percent between this and that. They will do the demographic modelling. This is the curriculum, this is the type of schools, and this is their performance on international tests. This is how many teachers, this is how many males and females and the number of out of school children etc. No one would actually address the ministry or the government or the society in any diagnostic because if they do then their tenure is going to be short. (Interview with Consultant 1, 17/07/2019)

This illustrates that consultants are not only being selective in their approach to contextualisation to support their policy narrative, they are also doing it as it is central to their business model.

The Bureaucracy and Policymaking

Although the Gulf States were amongst the last Arab States to gain political independence, they kick-started their economic and bureaucratic modernisation much faster than the other Arab States due to their accumulated oil wealth (Hertog, 2016). As a result, they managed to construct bureaucratic structures that appear to resemble those in developed countries. However, these differ significantly in their core function and competence.

The research on the civil service in the region has highlighted its 'dysfunctionality'. Jreisat (2012) argues that it has: overstaffed agencies, low productivity, red tape, and a shortage of innovative and effective public managers. Similarly, Jabbra and Jabbra note that despite the attempts in introducing reforms to

the civil service, administrative performance remains poor 'and the inability of Arab governments to reform bureaucracy seems puzzling' (Jabbra and Jabbra, 2005, p. 136).

Gulf bureaucracies, created under colonial rule in the 1930s, expanded rapidly in the 1960s, using oil wealth in order to service large-scale social welfare model and state-led economic development plans (Ayubi, 1990). The growing size of the bureaucracy, which was influenced by the Egyptian model, is not a unique feature of the Gulf as it has been observed in the Arab countries in general. It results from a number of factors including demographic growth, prestige associated with public office, strong belief in the developmental role of the state and access to useful contacts and networks. It is also the result of the emphasis placed on higher education by the Arab rulers which created too many graduates with no jobs to go to and ended up being employed in the civil service (ibid). Of particular relevance to the Gulf has been the expansion of the bureaucratic institutions as a result of the rentier nature of the Gulf States (ibid).

Research also shows that rents have a negative impact on the quality of institutions (Isham *et al.*, 2005), and create a 'rentier mentality' amongst bureaucrats and citizens, which is distinguished from the conventional economic behaviour. The rentier mentality

> embodies a break in the work-reward causation. Reward – income or wealth – is not related to work and risk bearing, rather to chance or situation. For a rentier, gain, an isolated fact, situational or accidental where reward is integrated in a process as the end result of a long, systematic and organized production circuit. The contradiction between production and rentier ethics is, thus, glaring. (Beblawi, 1987, p. 386)

Moreover, the tribal origins of the Gulf States have transferred their socio-political dynamics into the civil service institutions (Biygautane, Gerber and Hodge, 2017).

The bureaucracy, apart from servicing the social welfare to the growing population,

> serves as a respectable and modern looking method of distributing part of [the oil] revenues. Unlike traditional straightforward cash handouts, bureaucracy provides a more dignified way of distributing largesse, camouflaged in the language of meritocracy and national objectives. (Ayubi, 1990, p.137)

Furthermore, the highly influential political and bureaucratic positions in the Gulf States are commonly entrusted to members of the ruling families, or technocrats who express their allegiance to the rulers, as a strategy to solidify the latter's regimes against political rivals (Herb, 1999). This issue has been observed in the *generic regional reports* analysed at level 1 in the previous chapter, as this quote illustrates:

> In managing these institutions, political loyalties take precedence over efficiency and knowledge. (UNDP, 2003, p.11)

The nature of the highly centralised policymaking process in the Gulf monarchies (Khodr, 2014; Khodr and Reiche, 2012) has limited the public sector to implementing and administering public policies; thus the bureaucracy has become a service tool of political leaders rather than a professional institution with special skills for independent analysis and action (Jreisat, 2006).

Weaknesses of the bureaucracies have been highlighted by a number of international organisation reports calling for public sector reforms. As the Arab Human Development Report note:

> Reforming public administration is thus a central and urgent task for these countries; it lies at the core of the wider agenda of institutional reform (UNDP, 2002a, p. 116).

Whilst these institutional weaknesses are analysed and discussed in *the generic regional reports* at level 1, institutional capacity and limitations were subsequently downplayed in the *self-funded and commissioned reports* analysed at levels 2 and 3 in the previous chapter. An example is the RAND report for Qatar (Brewer *et al.*,

2007). When these issues were identified, RAND presented the bureaucratic systems as rigid, out-dated and resistant to change. However, instead of exploring the reasons underlying these issues and proposing solutions to address them, they recommended establishing parallel semi-government institutions to circumvent the rigidity. Nolan (2012) also observed the same in her analysis of the Saudi educational reforms.

Consultants interviewed maintained that, despite their awareness of poor capacity in the civil service, they were not in a position to incorporate it in their analysis. Because this was perceived to be a 'subjective' matter, they were not able to rationalise it or support judgement of it with objective data:

> Consultants don't want to be described as subjective, politically charged, biased, or that they have an agenda, whereas if they say we need to improve infrastructure, technology … these things are things that can be quantifiably measured without too much subjectivity. When you talk about low capacity building, people will dispute that, says who? According to which rubric? How did you measure that? Whereas if you say, 'we need to build 40 schools over the next 5 years and this is our plan and this is how much we want', it would be easier to justify to the public, the cabinet and the parliament than subjective things. (Interview with Consultant 1, 17/07/2019)

The inherent weakness of the public sector was often used as a justification for the reliance on external expertise; as these examples from policymakers interviewed in Bahrain show:

> Consultants make things move faster (Interview with policymaker 2, 17/01/2017)

> Consultants are good in our part of the world because in [the] absence of internal systems within the government and ministry departments to adjust policies or create new ones, the consultants are good in shocking the system and usually the come up with good policies (Interview with Policymaker 1, 15/01/2017)

My analysis has demonstrated that poor capacity of the bureaucracy and the civil service serves to explain the reliance on consultants in the region. It also illustrates why consultants often omit certain contextual factors from their analyses to sustain

their presence while recommending unsustainable solutions that fail to address the underlying issues. For example, creating parallel entities to circumvent the rigidities and low capacity of the traditional institutions is not a sustainable solution and it is not likely to build local capacity.

Population and Demographics

In addition to the political system and the oil economy, all Gulf States share demographic imbalances characterised by an overwhelming reliance on temporary migrant labour (Baldwin-Edwards, 2011). In 2010, with the exception of Saudi Arabia, foreigners accounted for more than 65 percent of the total labour force, and the figure was as high as 94 percent in Qatar (ibid).

This reliance on foreign workers has been attributed to three interrelated factors. First, it was the result of the rapid economic boom that accompanied the discovery of oil in societies that had relatively small populations:

> An initial inflow of foreign labour took place in the 1970s and early 1980s. The oil price booms at that time resulted in a sharp increase in the demand for labour to build up the GCC countries' physical and social infrastructure. To satisfy this demand, and in light of the relatively small size of local populations, the GCC countries adopted an open door policy to foreign workers. (Fasano and Goyal, 2004, p. 6)

Since then, the number of foreign workers in the Gulf States has increased fivefold from 1.1 million in 1970 to 5.2 million in 2000 (ibid).

The second reason for the reliance on foreign workers relates to the inability of the formal education systems to supply skilled labour. The third reason concerns the existing cultural aversion to certain types of low-skilled jobs, which results in importing unskilled labour (Al-Ubaydli, 2015). According to Fasano and Goyal (2004), expatriate and non-national participation in Gulf economies has traditionally segmented the labour market by employment sector, skill level and salary. Non-

nationals either take low paid, low skill, and labour oriented jobs or highly-paid, high skill, professional positions, mostly in the private sector, whilst the overstaffed public sector continues to be the employer of choice amongst nationals (Hertog, 2016). Ridge (2014) argues that public sector jobs are preferred amongst locals based on perceptions of greater prestige, higher wages, earlier retirement, shorter hours, and better benefits packages than the private sector offers, all of which are typical conditions resulting from the rentier economic model discussed in the previous section. Longva (2000) also suggests that that this issue is elemental to how the citizen-ruler bond is constituted in the Gulf; and its significant effect on the construction of national identity, which in the Gulf was borne out of the privileges associated with citizenship status, including access to public sector jobs.

The high population growth in the Gulf, with 60 percent of the population under the age of 30, places an additional strain on the government job-provision mechanism 'for citizens' (Forstenlechner and Rutledge, 2011). This strategy has practically reached its limits because the wage bill has become too large and cannot keep rising to satisfy the demand for government jobs by a young population.

Consequently, the Gulf States have focused on the employability of nationals and redirecting job creation towards the private sector through nationalisation efforts (Hertog, 2012). However, the challenge remains that appropriately skilled nationals are too few and too expensive. In addition, working conditions in the local-dominated public sector are still too attractive (Wiseman, Alromi and Alshumrani, 2014).

This issue was addressed in the all of the GEI reports analysed at levels 1, 2 and 3 in the previous chapter and is an example of elements from the local context being used as a framing device to define policy problems. All the commissioned

reports focused on the skill level of the locals, and suggested that their concentration in the public sector was related to their perceived low quality of locals. However, none of these reports attempted to analyse why this was the case. The reports merely noted that locals were not skilled enough for the private sector and recommended that the private sector was now expected to play a bigger role in creating jobs and developing the economy. This logic was repeated in the interviews:

> In high-end jobs, Bahrainis were not performing as well as expats (Interview with Policymaker 1, 15/01/2017)

The way the issue of local capability was framed and the related promotion of market-based solutions have been challenged their implementation as these are in tension with the prevailing rentier state-led economic development model. Furthermore, changing citizens' perceptions of jobs in the private sector has proven to be difficult. For example, the aim to attract students to vocational and technical education at secondary school level and to polytechnics at the higher education level have not been successful. Consultants indicated in the interviews that these aspects of the local context, particularly the attitudes of the locals towards vocational and technical jobs, which are dominant in the private sector, were difficult to predict and mitigate:

> When we were trying to promote vocational education, it never occurred to us why boys weren't interested. When we interviewed some of them, he said that a vocational degree and a vocational job won't help them get married. We [the foreign consultants] would have never guessed that answer or understood its relevance! How and why are these two things related were completely foreign to us! Later members of the Bahraini team explained how vocational jobs are associated with the lower paid jobs that expatriates usually take and how girls in the region don't want to marry a person who does that. (Interview with Consultant 2, 18/01/2017)

Thus, whilst consultants are using the imbalances of the labour market to frame their policy narrative and promote their market-led solutions, their proposed strategies do

not account for the full context. The proposed solutions are again not sustainable, and unlikely to achieve the aims set out from them.

Sociocultural Factors

Nationals of the Gulf States are predominantly Arab Muslims and their societies were founded upon traditional tribal systems which were mobilised according to Islamic and Arab identity (AGSIW, 2016). Language and religion have through the ages generated a unified culture, which constructs a form of identity; indeed, 'from their language Arabs have drawn their sense of national identity and from Islam they have drawn a collective sense of unity that often overlaps with nationalism' (Harik, 1990, p. 2). This has resulted in a striking similarity across the region's sociocultural norms and values. The Gulf societies share the same heritage, language and religion that defines their 'culture', a word often used as a synonym for local 'context' by outsiders. The Gulf societies operate under a strong religious ideology:

> Islam is inextricably bound within the state constitutions and in the way it impacts people's consciousness of statehood coupled with their capacity to operate with responsibility and self-determination (Lightfoot, 2014, p. 85).

Islam is not just a system of religious beliefs; it is a system of state, society and law. Islam places a very high value on education and the pursuit of knowledge:

> Islamic religious texts uphold a balance between religion and worldly life, or between temporal life and the hereafter. The predominant tendency in Arab-Islamic civilization is a robust interest in worldly life and its sciences and in encouraging knowledge and sciences of various forms Far from being opposed to knowledge, pure religion unquestionably urges people to seek knowledge and to establish knowledge societies. (UNDP, 2003. P.6).

The traditional form of schooling in these countries was the 'Kuttab', which was an adjunct of the mosque, if not the mosque itself, and its curriculum centred upon the Qur'an and the teaching of Islam (Shirawi, 1989). Similarly, the Arabic language holds social significance in the Arab world:

> Arabic is also connected with two basic matters that are closely associated with both the existence and future of Arabs. The first connection is with 'identity'; the second is the question of the 'sacred'. The Arabic language is the distinctive feature that distinguishes the Arab identity. It is the language of the holy Qura'an. And it was the rallying point for the intellectual, spiritual, literary and social activities incarnated in an entire human civilisation, namely the Arab Islamic civilisation. (UNDP, 2003, p. 11)

The purpose of education in Gulf society has therefore been to preserve and transmit Islamic values (G-Mrabet, 2012) and for a very long time, religion, language and history have been the main focus of public education in the region; the curriculum of schools and colleges continues to be dominated by Islamic and Arabic Studies (Bahgat, 1999).

One of the challenges facing the creation of the western construct of the knowledge-based economy and society in the Gulf is that it is in tension with its cultural and contextual expectations, traditions, and norms:

> The cultural mesh between Islamic communities and the rhetoric and expectations of a largely secular and westernised knowledge economy model is surprising given the potential extremes in difference. (Wiseman, Alromi and Alshumrani, 2014, p. 33)

The main manifestation of this tension can be seen in the emphasis on science, technology, engineering and mathematics (STEM) subjects and the English language. The Gulf States have prioritised English language skills, this being the lingua franca in a globalised world. The UAE's approach is the most drastic: the emirate of Abu Dhabi has partnered with Australian consultants to adopt English language curriculum in Science, IT and Maths, and hired native English speakers, mostly from the United States, to teach grade 12 students English; this has led to issues and tensions (O'Sullivan, 2015). I will elaborate more on these reforms in Chapter 6. When the UAE's reforms were introduced, it was argued that English was 'a doorway to a treasure of knowledge' (Badri and Khaili, 2014, p. 9), and would

provide nationals with greater opportunities for tertiary education and employment. Thus, the Abu Dhabi Department of Education and Knowledge (ADEK)'s strategic plan, following the consultants' advice, elected to bring English speakers to teach English, mathematics and science-related subjects (ibid). However, the adoption of an English curriculum and the move towards teaching in English rather than the native Arabic language in the emirate raised numerous tensions, described as a 'clear violation of the country's constitution' (Issa, 2013). It has been noted that 'teachers are warning against Arabic becoming a foreign language in the UAE' (Pennington, 2015). Similar controversies arose in Qatar and resulted in policy reversals after similar reforms were introduced in the independent schools (Alkhater, 2016)

Overall, whilst the level 1 *regional generic reports* analysed in the previous chapter, particularly the AHDR reports, acknowledged, and appealed to, Islamic and Arabic encouragement to seek education and knowledge, these aspects were avoided in the *GEI's self-funded and commissioned reports* analysed at levels 2 and 3 in the previous chapter, as much of this context is in conflict with their proposed reforms. However, by omitting these critical socio-cultural factors, the proposed reforms were seriously challenged at the implementation stage.

Reforms and State-branding

By the turn of the 21st century, the Gulf's highly conservative monarchies entered a period of political reform that was broadly liberalising through the establishment of consultative councils and elected parliaments (Ehteshami and Wright, 2007; GCC Secretariate General, 2002). However, the changes were gradual and Abraham (2015) argues these should not be understood as an equivalent to western-style

democratisation. Three countries identify themselves as constitutional monarchies;[15] Kuwait became a constitutional monarchy at its independence in 1961; Bahrain became a constitutional monarchy in 2002; and Qatar is technically a constitutional monarchy having reformed its constitution to increase public participation in 2005 although no elections have been held to-date (EIU, 2019b). The other Gulf States remain absolute monarchies in which political power lies with the head of the state. For example, in Saudi Arabia and Oman, the head of state is also the Prime Minister, who presides over the cabinet and the legislature councils.

> As 'democracies,' that is, countries in which nearly every adult can vote, elections are freely contested, the chief executive is chosen by popular vote or by an elected parliament, and civil rights as well as civil liberties are substantially guaranteed. The existing systems often resemble what is sometimes called a 'trick democracy,' rather than a true democracy, (Kapiszewski, 2006, p. 89).

Despite the establishment of institutions such as parliaments, the constitutions in the Gulf continue to provide the sovereign the power to appoint the government and set public policy (Kapiszewski, 2006; Parolin, 2006). Consequently, the role of the legislative branch remains largely advisory (Khodr, 2014). Thus, policymaking in these constitutional monarchies remains similar to that in an absolute monarchy. Herb (1999) argues that the policymaking process remains a reflection of the ruler's priorities and preferences.

[15] 'In a comparative context, the Arab monarchies with parliaments are constitutional monarchies. This usage has wide acceptance in the historical literature to denote a monarchy with an elected parliament that has not wholly usurped the monarch's power to determine the composition of the ministry. Unfortunately, the term constitutional monarchy also commonly denotes a democracy decorated by a monarchy- this is true in Arabic as well as in English.' (Herb, 2004, p. 369).

Such political reforms ran in parallel with ambitious economic reforms which aimed to diversify the economy away from oil. The Gulf's dilemma is that oil exports are not just another sector of the economy: 'In the Gulf, the oil sector dominates the economy; it is almost the unique source of wealth' (Beblawi, 2011, p. 188). The Gulf States recognised very early the importance of economic diversification and had attempted with limited success to diversify the economy away from oil dependency (Hanieh, 2018; Hvidt, 2013). In most of the Gulf States oil still accounts for between 70 and 80 percent of government revenues (IMF, 2016). Consequently, decades of reliance on oil rents resulted:

> in problems of low productivity, low job creation, lack of economic diversification, high volatility of state incomes, and lack of motivation and employability of the national workforce are becoming evident to the region's planners and decision makers. (Hvidt, 2012, p. 190)

At the turn of the 21st century, the Gulf countries renewed their commitment to economic diversification with bold economic reforms, which resulted in the production of a wave of 'national' economic vision statements (outlined in Table 5-1). These visions, though not identical, were very similar in their ultimate aims (Hvidt, 2012), and most of these were developed by international management consultancy firms (Al-Kuwārī, 2012). Hanieh (2018) argues that understanding how policies are formulated in the Gulf and why their strategies resemble market-oriented economic planning found in other parts in the world, is related to the role played by international management consultancy firms in the region.

Year	Vision	Aims
1995	Oman Vision 2020[16]	• To ensure that the per capita income remains at its 1995 level as a minimum while aiming to double it in real terms by 2020. • To create favourable conditions for economic progress. • The government will use the oil and gas revenues to achieve economic diversification while playing its role towards the provision of health and education social services, training citizens and developing their skills, and pursuing such policies aimed at promoting decent standard of living. (SCP, n.d.-b)
2008	Bahrain Economic Vision 2030	• To ensure that by 2030 every Bahraini household has at least twice as much disposable income. • To shift from an economy built on oil wealth to a productive, globally competitive economy, shaped by the government and driven by a pioneering private sector – an economy that raises a broad middle class of Bahrainis who enjoy good living standards through increased productivity and high-wage jobs (EDB, 2008b)
2008	Qatar National Vision 2030	• To transform Qatar into an advanced country by 2030, capable of sustaining its own development and providing for a high standard of living for all of its people for generations to come • To develop Qataris to sustain a prosperous society, a just and caring society based on high moral standards, a competitive and diversified economy capable of meeting the needs of Qataris, and securing a high standard of living, and manage the environment such that there is harmony between economic growth, social development and environmental protection (GSDP, 2008)
2010	UAE 2021	• To develop a strong and safe union, in which knowledgeable and innovative Emiratis will confidently build a competitive and resilient economy, and which will thrive as a cohesive society bonded to its identity and enjoy the highest standards of living within a nurturing and sustainable environment (UAE PMO, 2018b)
2016	Saudi Vision 2030	• By 2030, Saudi Arabia, the heart of the Arab and Islamic worlds, will be an investment powerhouse and the hub connecting three continents (CEDA, 2016)
2017	Kuwait Vision 2035: New Kuwait[17]	• To transform Kuwait into a financial and trade hub, attractive to investors, where the private sector leads the economy, creating competition and promoting production efficiency, under the umbrella of enabling government institutions, which accentuates values, safeguards social identify, and achieves human resource development as well as balanced development, providing adequate infrastructure, advanced legislation and inspiring business environment' (SCPD, n.d.-b)

[16] Oman has already prepared a preliminary version of Oman's Vision 2040. Much of its substance is similar Vision 2020.

[17] 'The launch of New Kuwait Vision 2035 represents a second attempt by the government to transform Kuwait into a regional financial and commercial hub for the northern Gulf. The first plan, which also ran to 2035, was commissioned in 2010 by the government of the previous Prime Minister, Nasser Mohammed Al Sabah, at controversial public expense. The plan was developed by Tony Blair Associates but never gained policymaking traction and was quietly shelved after Sheikh Nasser resigned as prime minister in November 2011' (EIU, 2017).

Table 5-1 Economic Visions

The vision statements shown in Table 5-1 have become the region's policy response to the sustained decrease in oil prices; the visions have ambitious targets and objectives for a post-oil transition toward knowledge-based economies. Since their launch, these visions have been supplemented by numerous strategic plans aimed at introducing mid-term initiatives to achieve the visions' targets and provide performance indicators to measure their success. I will return to these targets and indicators in Chapter 7 to analyse the implementation of the reforms. Ulrichsen (2017a, p. 6) claims that these visions 'contained key buzzwords about the development of social and human capital designed to appeal to a global audience of potential investors and business partners', which has been interpreted as more of an outward looking 'state-branding' strategy (Ulrichsen, 2014b).

States have long marketed themselves to promote tourism and economic development and, with the increased global competition, they are now using modern marketing techniques as an explicit political tool, creating and developing a brand to advance foreign policy (Van Ham, 2001). Such practices are known as 'state-branding' and they also serve a domestic purpose of fostering a sense of national identity, loyalty and social cohesion.

Nye (2004) portrays state-branding practices as a form of 'soft power' that is designed to make a nation politically, economically and culturally more competitive in the world. It is a powerful tool essential for small states aiming to develop a competitive edge. In the Gulf, Qatar and the UAE are clear examples of state-branding (Ulrichsen, 2014b). The economic visions discussed above are examples of such state-branding activities. Other activities include the modernisation reforms, international sports events, hosting international conferences and associating with

global influencers and ‘thought leaders’. Scholars identify as examples of ‘state-branding’ the development of education cities in Qatar and the UAE, which are arguably part of the ‘upgrading’ strategies focusing on building international linkages.

The Gulf’s involvement with the GEI is arguably part of the ‘upgrading strategies’ described above. The GEI is also assisting the Gulf States in developing ‘upgrading strategies’ such as the state-branding activities and the reforms. As such, the Gulf’s involvement with the GEI should not be seen as a one-way relationship. In their quest for modernity through state-branding and upgrading strategies, the Gulf States have created a situation in which both they and the GEI are benefiting. The Gulf States are both shaped by and shaping the GEI. For example, Ridge, Kippels and Shami (2016) note how the UAE is home to Global Education Management Systems (GEMS), an international education advisory and educational management firm and the largest for-profit operator of K-12 schools in the world (Sharif, 2013). GEMS is also a subsidiary of the Varkey Foundation, which annually awards the Global Teacher Prize at a ceremony with the Founder and Executive Chairman of GEMS Education (Varkey Foundation, 2018).

	Bahrain	Kuwait	Qatar	Oman	KSA	UAE
Founded/ Independent	1971	1961	1971	1970	1932	1971
Type of government	Constitutional Monarchy (since 2002)	Constitutional Monarchy	Constitutional Monarchy (Since 2005)	Absolute Monarchy	Absolute Monarchy	Absolute Monarchy
Legislature	The National Assembly: Council of Representatives and Consultation (Shura) Council	The National Assembly	The Advisory Council	The Council of Oman: State Council and Consultation (Shura) Council	The Consultation (Shura) Council	The Federal National Council and Federal Supreme Council
Economic indicators in USD (2016)[18]	GDP: 31.86 billion GDP per capita: 22,354.17	GDP: 110.9 billion GDP per capita: 27,386.29	GDP: 152.5 billion GDP per capita: 59,324.34	GDP: 66.82 billion GDP per capita: 15,102.38	GDP: 644.9 billion GDP per capita: 19,982.09	GDP: 357 billion GDP per capita: 38,517.80
Hydrocarbon revenue, % of total government revenue (2015)[18]	78.1	88.6	81.8	62.4	72.3	41.4
Population Total (2017)[18]	1.052 Million	2.548 Million	2.639 Million	4.636 Million	32.94 Million	9.4 Million
% of foreign labour[19]	76 (2008)	83 (2009)	94 (2008)	74 (2008)	50 (2008)	85 (2008)
Religion/ Language	Islam Arabic	Islam Arabic	Islam Arabic	Islam Arabic	Islam Arabic	Islam Arabic

Table 5-2 Overview of the Gulf Stats' commonalities

[18] World Bank Data.

[19] Foreign components of labour force in the Gulf States (Baldwin-Edwards, 2011).

Differences

The commonalities analysed in the previous section should not be taken to mean that the Gulf is wholly homogenous. Most of the studies about the Gulf States tend to address the region as a whole because the individual states share a number of commonalities. However, they also have differences that mark them out from one another. These differences result either from the commonalities discussed in the previous section manifesting in different degrees at the individual state level or from unique historical and geographical factors. The differences at the state level create different policy priorities, none of which were considered in the narratives of the GEI's generic regional or commissioned country reports analysed at the 3 levels in the previous chapter. Instead, these reports tended to standardise the policy problem, using the economic factors which subsequently justified the transfer of 'international best practices', or as the WB now describe their approach as 'from science to service delivery'. In this section I discuss examples of these differences to highlight the different local policy priorities and, where possible, link these to educational policymaking.

Bahrain and Oman have modest natural resources compared to the rest of the Gulf States, and, since the late 1970s, both states have accelerated their diversification plans, albeit with limited success as in both countries the hydrocarbons sector remains a key driver of the economy. Both countries are vulnerable to oil price changes in the global market and have suffered from decades of austerity measures as a result. Consequently, unemployment issues are more pronounced in these two states than the rest of the Gulf. In 2011, despite Bahrain being the only country apart from Kuwait in the region to have an elected

Parliament, they both witnessed protests during the Arab Spring, calling for more political inclusion.

In Oman, too, there were protests during the Arab Spring, but unlike Bahrain, where they were framed according to sectarian agendas (Al-Rawi, 2015), Oman's culture of tolerance, influenced by the Ibadi school of Islam that is practised in the sultanate supressed sectarian and tribal tensions, which for a long time were kept under control. However, in both countries such tensions continue to be pushed to the background in policymaking. For example, in Islamic Studies and civic studies, these issues are not discussed. A consultant working in Bahrain reflected on the political nature of this aspect when asked why curriculum was not considered as part of the reform strategy in Bahrain:

> Normally, as for example in Singapore, the idea of national identity, the nature of a good citizen, etc. would appear in the national educational charter. Developing a charter would normally be something that would drive strategy and, in particular, give shape to the national curriculum. The aims of the curriculum (particularly those around citizenship) would be determined at the outset. Now, for some reason, which I assume to be political, it was decided not to touch the existing curriculum …
>
> … I remember a long discussion I had with the lead consultant about the curriculum and why the reform architects decided not to tackle the curriculum, their answer was that it was too difficult. The curriculum is of course a form of control. It asserts a certain set of values and beliefs which are not allowed to be questioned. So, there is the obvious political dimension. To challenge this would have opened a can of worms …
>
> … However, all this changed in 2011 when clearly half the population didn't swallow the government's narrative about what a good citizen is. The minister put enormous energy into revamping citizen education. A new textbook was hurriedly introduced and teachers were trained to reinforce the values it espoused. Anyway, the new textbook came out, and, as expected, it has made little difference. The old curriculum has had a few changes at the subject level but there is still no charter, no framework of values and skills and the textbooks are just new versions of the old. (Interview with Consultant 2, 13/11/2017)

The other Gulf countries are not under such urgent pressure to diversify their economy but they also face their own unique policy issues. Kuwait, for example, is

one of the richest states in terms of oil reserves and faces no real urgency to diversify; however, the Iraqi invasion of Kuwait in 1990, which ended when a US-led military coalition ousted Iraq during the Gulf war, had a profound impact on the country's policy priorities, especially in terms of foreign policy. Kuwait is also challenged by long-standing political tensions arising from the existence of an appointed cabinet and an elected parliament, as well as faults that run along tribal, ideological and sectarian (EIU, 2019a). Such tensions have led to chronic instabilities, and no parliament has completed a full term since 2003 (ibid). With every new term, there is a change of Ministers of Education and administrators, causing a long line of interrupted domestic reforms. One of Kuwait's longest standing issues is that of expanding the rights of the 'bidoon' (from *bidoon jinsiyya,* or 'without citizenship') – tribal residents of Kuwait who lack citizenship or voting rights. These bidoon do not have access to many social welfare benefits the state provides its citizens, including education, and many live in poverty (Weiner, 2017). Moreover, Kuwaiti citizens, as a result of the generous welfare system, suffer from the 'rentier mentality', under which, they have become reliant on public sector jobs and unmotivated to seek meaningful employment (Martin, 2019).

The UAE is the only federation in the region and faces issues around the unequal conditions across the seven emirates. Within the UAE, Abu Dhabi and Dubai are the wealthiest and most powerful whilst the other emirates are relatively poorer. Despite the efforts of the Federal MOE, the education systems in Dubai and Abu Dhabi are markedly different from the other five emirates. Among the numerous challenges facing the UAE, the generous welfare state model that has been a cornerstone of the country's stability since its independence has cultivated a citizenry that is accustomed to material benefits which made them unmotivated to

seek meaningful employment. As a result, the indigenisation of the workforce, which is currently very dependent on foreign workers, remains a serious challenge (Davidson, 2011b). Though this issue was not explicitly addressed by the education reforms, the overall aim of improving the skill level of emirates was established (UAE PMO, 2018a) and linked to the national visions. However, attention was not paid to the socio-cultural aspect arising from the deficient set of values so heavily influenced by the generous oil welfare system.

Saudi Arabia is large in size, both in geography and population, and challenged by religious extremism more than the other Gulf States. The Saudi state was established in the 18th century through a coalition between the Al Saud, the Saudi royal family, and Muhammad ibn Abd Alwahhab, a religious leader and the founder of the Wahhabi movement (Al-Rasheed, 2010). This alliance helped Al Saud to legitimise their rule and create a durable state in the early 20th century (ibid). The result of this is a long-lasting religious influence on the way the country is governed. This influence is evident in the curriculum, which has been criticised for creating a fertile ground for extremism (Prokop, 2003). This has come under scrutiny following the terrorist attacks in the USA in September 2001 and the Al-Qaeda led wave of terror attacks that rocked Saudi Arabia in 2003. Yet, whilst the Saudi government was clear the educational reforms must address radicalism, it was through international referencing that these reforms were legitimised to circumvent the religious sensitivity (ibid). Saudi Arabia is also the largest of the Gulf States in geographical size, thus one of the main issues facing the state is ensuring the equal provision of schooling, both in terms of access and quality, across all regions. A recent article published in the *Financial Times*, claims that the country continues to

struggle to keep extremism in check and further highlights that, while strides were being made in the big cities, smaller towns continue to be a source of concern:

> Fawziah al-Bakr, a professor of education at King Saud University, says progress has been made reforming the system, particularly in large cities. But concerns linger over whether small towns and rural areas are receiving the same level of attention in a country where 70 per cent of the population is aged under 30 (Al Omran, 2018, para. 10).

Finally, Qatar, while today perhaps appearing as a modern city-state, is still home to a largely very conservative native population. Twenty years ago the culture in Qatar was very conservative, second only to that of Saudi Arabia. The issues around balancing traditions, cultural identity and heritage with the rapid pace of modernisation, while common to all Gulf societies, are particularly acute in Qatar because of the rapid population growth over a short period of time. According to World Bank statistics, the population grew from 860,000 to around 2.6 million in the years between 2005 and 2017 (World Bank, 2019). Qatar is also very dependent on migrant labour, imported to achieve the state's ambitious development plans; an issue that further threatens local traditions. However, this issue does not appear to be prioritised in educational policymaking (Al-Kuwārī, 2012). In fact RAND suggested teaching in English (Nasser, 2017), a move that angered the Qatari society and resulted in several controversies that ultimately led to the reversal of the reforms (Khatri, 2013). This will be discussed in more detail in Chapter 7.

5.1 Discussion: The Multiple Contexts of Educational Policymaking in the Gulf

Building on the findings in the previous chapter and the analysis in this chapter, there appear to be multiple 'contexts' affecting educational policymaking in the Gulf region. The educational reforms, which I analyse in the next chapter, emerged from the active framing of the GEI, where the purpose of education was portrayed as wholly economic and the problems of education systems were thus constructed around the need to prepare students for the labour market and increase their 21st century skills. Consequently, the solutions to improve the education system comprised a set of borrowed 'international best practices' marketed and sold by the GEI. However, by definition, 'framing' implies that there are many competing realities through which the aspect of a context can be interpreted, and an analysis of the context beyond the GEI's reports and policy documents revealed that there are other factors embedded in the Gulf societies which affect education but are not considered. My portrayal of context in this chapter is in no way a portrayal of a 'true' reality; on the contrary, it is a confirmation that multiple realities exist (Piattoeva, Klutas and Souminen, 2019) and that the concept of 'context' is problematic (Cowen, 2006). However, my portrayal points towards aspects that are especially relevant to the understanding of the approach to educational reforms in the Gulf.

The analysis of the commonalities and how these are addressed by the academic literature and the GEI reports confirms that, whilst at the generic regional level a wider context is considered, this is not the case in the self-funded or commissioned reports. Moreover, interview data show that local policymakers, whilst aware of the broader contexts, mirror the GEI's framing and downplay them.

The analysis in this chapter serves to explain two main aspects – first, why the Gulf States are receptive to the GEI and their recommended 'borrowed' policies and, second, how factors embedded within the Gulf's local context explain the constraints of the GEI's approach and the disappointing outcomes of the reforms. The main arguments presented in this Chapter are that:

1. The historical path to state formation developed a mentality that established, very early on in the state building process, a reliance on external expertise. This was further reinforced by the rentier state model which provided the means to finance this reliance and create a low internal capacity for local expertise to be developed. The intensification of globalisation and the changes imposed on the rentier economic model, altered the reliance on external expertise; 'upgrading strategies' that characterise the post-rentier model reinforced the reliance, albeit with a nuanced approach in which the Gulf States have moved from pure reliance on external expertise to a relationship with mutual benefits. Ridge (2011) points to the increased interest in signalling global alignment and being seen to be key players in relation to global development agendas, through 'partnerships'. These partnerships a key to the state-branding approaches that are part of the 'upgrading strategies'.
2. Whilst this explains the persistence of the approach and reliance on external references and experts, it also explains the limitations of this approach in achieving the desired outcomes. Local contextual factors downplayed in the consultancy reports mask underlying problems and highlight symptoms. Members of the GEI approach their involvement

with the aim of protecting and prolonging their business interests; if they were to highlight the underlying issues it would negatively affect their tenure. As a result, their proposed solutions are temporary: they produce an initial impact which is not sustainable in the long run. This is because they do not take the full context into consideration and their policy recommendations are designed to circumvent the real issues. Moreover, as their solutions do not ensure capacity building they reinforce a cycle of dependency.

These two arguments are presented in Table 5-3 below and in the following chapter, I analyse the approach in more depth before moving on to examine the outcomes of the reform programmes in Chapter 7.

Factor	How could this explain the reliance on policy borrowing and consultants?	How could this explain the constraints of the approach?
Historical: State formation	The gradual handover of power fostered a positive outward relationship that legitimised and encouraged foreign expertise.	The Gulf States have not broken out of this cycle of dependency on foreign expertise.
Government: Oil monarchies	Access to accumulated hydrocarbon wealth eased the reliance on consultants. At the same time the reliance on hydrocarbon wealth also created a sense of urgency to find alternative solutions. Both justified 'purchasing' reforms.	In the short term, purchased solutions are standardised and ignore many local factors. In the longer term the process of 'purchasing' reforms undermines the longer process of local capacity building.
Policymaking and bureaucracy	Lack of institutional capacity resulting from the centralised policymaking process and the inherent weaknesses of the civil services validated the need to hire external expertise.	Imported reforms are bounded by the capacity of these same institutions, thus, are not sustainable.
Population and demographics	The small population of locals in economies that have grown rapidly, required imported labour and reliance on foreign expertise	The small pool of local expertise who are not benefiting from capacity building end up being in charge of implementation once the experts handover. They rotate between the older marginalised structures and the newly established quasi-institutions.
Sociocultural factors		Achieving a balance between Islam, social traditions, and modernity impedes the reforms' implementation

Reforms and State branding	The Gulf States 'upgrading strategies' are focusing on projecting a positive image through state branding to gain competitive advantage. This increased cooperation with internationally recognised brands (International Organisations, associations and brands)	The outward-looking mentality is designed for a global audience and is often in tension with the local context. .

Table 5-3 Summary of analysis discussion

Chapter 6 **The Approach to Educational Reforms in the Gulf**

From the previous chapters it is clear that over the last two decades, the Gulf countries have invested heavily in education and launched ambitious national reform projects with the aim of better preparing their 'human capital' and diversifying their economies away from oil. On *prima facie* terms, there is a strong degree of commonality in the approach to educational reforms across all the individual Gulf States, one in which a network of the world's leading private sector consultants and educational experts were commissioned to design, implement, manage and often evaluate system-wide educational reforms that emulate features of the world's top performing education systems.

In this chapter, I compare and analyse the approach to educational reforms in all of the six Gulf States to identify its critical features. In doing so, I address the second research question of this study: **What were the critical features of the approach to educational reforms in the Gulf over the last two decades?**

As noted in Chapter 2, Gulf and international scholars have studied the reform initiatives that have emerged in the region over the last two decades, but their approach has focussed on assessing the outcomes of reforms outcomes and/or evaluating the progress of implementation; the tenor of this literature is that the reforms have had no or very limited impact. Moreover, they also appear to have adopted a normative perspective; this is encouraged in universities in the region so as to align academic research with policymaking and increase research output, an approach that mirrors the GEI's logic. Much of this research aims to address questions about what can be learned from other systems. As discussed in the literature review chapter, few studies question the approach it itself and analyse it critically.

The Gulf States are known for their high spending on education. Since the 1980s, government expenditure on education in the Gulf countries has been comparable, on average, to many developed countries when taken as a percentage of GDP. On average the Gulf States allocate 14.1 percent of their GDP to education (Alpen Capital, 2018). Developed country norms vary between 5 percent and 15 percent, with Germany spending 5.2 percent of its 2016 budget on education, the UK 11.85 percent and the US 14.9 percent (Oxford Business Group, 2019a).

Yet a standard refrain, especially in the grey literature, is that this high level of spending has not yielded returns in terms of quality (World Bank, 2017). Consequently, there is no shortage of sporadic and ad-hoc projects launched to improve education in the region; these projects have been part of the investment of oil wealth by the Gulf States to accelerate the modernisation of education systems, and they have done this mainly through importing features of the world's top education performers (Kirk, 2015). The initiatives launched over the last few decades have come in many forms with multiple targets, in some cases duplicating existing efforts. Trying to capture and discuss every project would be an enormous task and require a space larger than this PhD permits. Therefore, in selecting the K-12 reforms for analysis, I will focus on the comprehensive system-wide reforms that were launched at the national level and had the widest publicity.

Through a comparative analysis of mainly the grey literature, supplemented by academic literature and interview data, I analyse the approach to educational reforms in the six Gulf States by addressing the following questions:

- When were the reforms introduced and why?
- What were the main areas of reform?

- How were these designed and implemented?
- Who was involved?

Accordingly, this chapter is presented in two main sections. The first will analyse the approach according to the questions listed above, and the second section will present a discussion of the findings.

6.1 Analysis: Educational Reforms in the Gulf

Bahrain

Bahrain is the smallest Gulf country, yet it serves as an important model for modernisation movements in the region. It has had a strategic position at the commercial crossroads for over 4,000 years linking the East and the West, and benefited from the Gulf's trade routes which fast-tracked its openness to the world. It was the first Gulf State to discover oil, in 1932 and, subsequently, the first to develop plans to diversify its economy away from oil due to its modest reserves in comparison with those of its neighbours. Over the past 40 years, Bahrain led the regional modernisation transition, setting an example of economic diversification in the 1980s when it opened its doors to the financial institutions leaving Lebanon after the civil war, to become the region's financial hub (Hanieh, 2018). In 2001, a 'national charter' was introduced outlining the beginning of an ambitious political reform programme that introduced significant liberalisation (Parolin, 2006). Consequently, in 2002, Bahrain became a constitutional monarchy, and a democratically-elected Parliament was established, marking the beginning of a period of ongoing reformation. The first reform was economic in nature and spearheaded by the EDB under the chairmanship of the Crown Prince and the goal was to prepare for the 21st century by reducing Bahrain's dependence on oil.

British influence was more systematically applied in Bahrain than elsewhere in the region and was personified by Sir Charles Belgrave, who was ‘adviser’ and later ‘secretary’ to the ruler for over three decades, starting in 1926. In 1946 the British Resident, the senior British official in the Gulf, moved from Iran to Bahrain. Until their independence in in 1971, Qatar and the Trucial States (now UAE) were under the purview of the Resident who managed things from Bahrain (Peck, 2007). As a result, the public administration established at the time in Bahrain served as a benchmark for the other Gulf States.

Bahrain’s education system is one of the oldest in the region. In 1930, the government assumed responsibility for two pre-existing schools that were established by local merchants, a boys’ school that was established in 1919 and a girls’ school in 1928, marking the beginning of formal public education in the country (MOE, 2019). Throughout the 20th century, specifically after independence in 1971, there was heavy investment in infrastructure and modernisation programmes (Al-Mudhahki, 2017). Today, Bahrain’s education system displays the highest indicators of literacy and enrolment rates in the region (UNESCO, 2019).

When were education reforms introduced and why?

In 2005, a comprehensive education reform programme to improve the performance of the education system and meet the needs of the 21st century was introduced. The EDB worked in ‘partnership’ with McKinsey & Company, but in practice the consultancy led the reforms. The two organisations had previously collaborated on economic and labour market reforms. McKinsey & Company were chosen to provide their consultancy services in Bahrain after being introduced in Davos to the Crown Prince (Interviews with policymaker & Consultant); this tactic has been identified in

the literature as a standard in the region, in which consultants would approach heirs or crown princes directly to be hired (Saif, 2016).

The initial reform period from 2005 to 2010 involved three phases which were implemented by working teams representing local stakeholders and international advisors appointed by the EDB. The reform strategy was explicitly based on a form of policy borrowing:

> They [the working teams] were asked to study the most successful reforms undertaken around the world, and employ the learning to develop a bold and comprehensive reform plan for Bahrain. (EDB, 2006, p. 2)

This logic guided, and continued to influence, the three stages of the reform; these were termed the diagnostic, the strategy design, and the implementation phases.

The diagnostic phase lasted for six months between June and November 2005. A team of McKinsey consultants, supported by the EDB, analysed the education system with the aim of evaluating its performance and identifying the causes of poor performance. They carried out surveys of students, parents and businesses; they conducted focus groups with top performing students; schools and university visits; interviewed key officials, and reviewed internal and external reports such as the reports of the UNDP (2005b) and TIMSS results analysis.

This phase highlighted the education system's underperformance relative to international benchmarks (EDB, 2005) and noted that, in the 2003 TIMSS survey, Bahrain's students ranked 37th in Maths and 33rd in Science out of 45 participating countries; this placed them well below the international average. Bahrain's participation that year was its first in TIMSS. McKinsey suggested that students should improve their knowledge application and problem solving skills. In their diagnostic report, they also claimed that there was a clear gap in performance between boys and girls. They attributed Bahrain's poor performance to the fact that:

> The curriculum is focused on knowledge and not skills and the quality of teaching is poor, resulting from a failure to attract, train, and manage teachers. (EDB, 2005, p. 3)

The results were presented in a workshop sponsored by the Crown Prince and attended by more than 200 key officials in the country. This appeared to create the necessary momentum, despite the initial reluctance from the MOE to support the launch of the reforms, and attracted the attention of the local media, which described the findings as 'shocking' and 'appalling' (Gulf Weekly Magazine, 2008). The results of the diagnostic study, presented in the workshop, spurred the government to take action and introduce reforms that were designed to pave the way for progress and the future development of the economy.

How was the reform designed and implemented? Who was involved?

The strategy design began in February 2006. Working teams, comprising consultants and representatives of the relevant local agencies, reviewed the diagnostic findings and concluded that the problem did not lie with the inputs into Bahrain's education system as spending on education, schooling hours and teacher to student ratios were comparable to the highest performing systems; they therefore claimed that the problem was related to the quality of teachers.

> You can have the best curriculum, the best infrastructure, and the best policies; but, if you don't have good teachers, then everything is lost. (EDB, 2006, p. 19)

Subsequently the strategy phase focused on identifying solutions that the consultants claimed were proven to have an impact on teacher quality and the performance management of the school system.

In June 2006, the strategy of the reform was presented in a nationwide press conference sponsored by the Crown Prince (EDB, 2006). The approach was based on

identifying the best possible improvement ‘levers’, as these were termed, which were narrowed down to those that had the most potential for improving the education system (ibid). The Education Reform Board, headed by the Deputy Prime Minister and a Project Management Office (PMO) led this phase as illustrated in Figure 6-1 below. They were supported by McKinsey, which continued to operate as a ‘partner’, but in reality was playing the leading role:

> McKinsey was the overall curator of the reform in Bahrain; the other agencies brought their own experiences to the different initiatives they were assigned to. (Interview with Consultant 1, 17/07/2019)

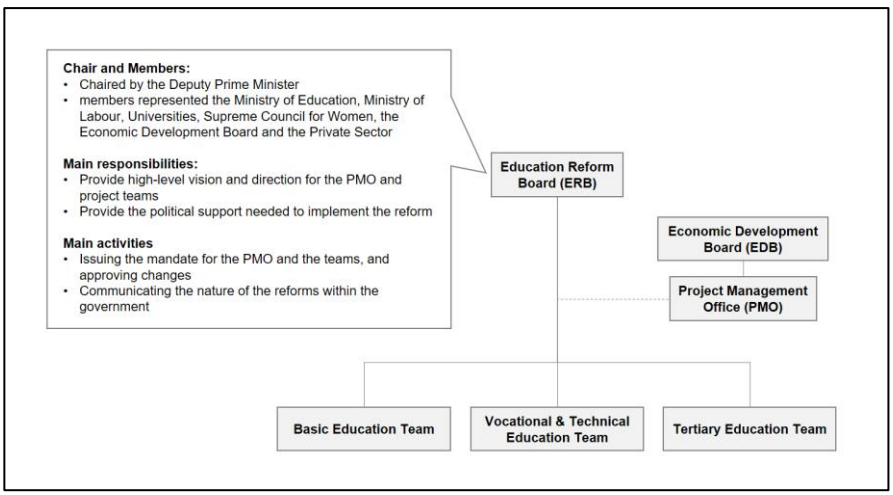


Figure 6-1 Bahrain’s reform governance structure during the strategy phase

Despite identifying themselves as ‘partners’, the McKinsey consultants’ leading role illustrates the significant part played by members of the GEI in shaping educational reforms in the region, marginalising the local institutions, such as the MOE. This has been observed in the other Gulf States, as I will illustrate in the following sections. This leading role is also different from what has been identified in the literature about the nature of non-state actors’ role in Western contexts, but it resembles the nature of their involvement in developing countries.

The working teams, depicted in Figure 6-1 above, spent four months identifying and prioritising the ‘levers’ through investigations of the diagnostic results, interviews with international educational experts, benchmarking studies of the top performing countries in educational league tables like TIMSS and PISA, and visits to many of these countries. The outcome was a set of proposals that, it was claimed, would have the highest impact on the performance and quality of the education system across all levels, and would mark the first step in the reform. The proposals included the establishment of a teacher training college as well as an independent quality assurance authority to manage school performance. The plans were also shared with international experts who were key members of the GEI network, such as Michel Barber and Peter Hill, for ‘auditing’ purposes before finalisation (EDB, 2006).

The Implementation of the specific initiatives, described as internationally benchmarked best practices, was outsourced to specialist service providers or, as they were termed, ‘international partners’ who had been identified in the strategy design phase. A team of McKinsey consultants, assisted by the PMO, identified and contacted the ‘best’ international expertise in each areas of the reform to participate in the tendering process. The same team also managed the tendering process and evaluated the bids to find the ‘best’ provider. Once the tendering period was over and ‘partners’ were selected and contracted, the PMO was tasked with monitoring the progress during this phase using monitoring tools developed by McKinsey. This illustrates that the lead consultants’ role, i.e., McKinsey, extended to give them the power to influence who was subsequently selected to implement the reforms and to evaluate their performance.

Implementation started in 2008, the selected 'international partners' began their work in the summer and continued to operate until late 2010. Table 6-1 below summarises the prioritised initiatives and the international partners selected to deliver them.

Area of reform	Justification for prioritisation	Proposed initiatives	Implementation/ Providers.
Teaching profession	Poor performance attributed to the quality of teachers	Improve **quality of selected teacher candidates**	**National Institute of Education (Singapore)**: to assist the MOE and the University of Bahrain in developing the teacher selection processes
		Establish a new teacher training college that provides **pre-service and in-service training**	and in establishing a teacher training college that offers pre-service and in service programs as well as designing the ideal profile of a teacher candidate and admissions criteria to select the best candidates for the teaching profession
School systems' performance management	System performance management necessary to improve teaching quality	Establish a **national examination system**	**Cambridge Examinations (UK):** to design and deliver the national examinations systems
		Introduce independent **school reviews**	**Nord Anglia (UK)**: to establish the schools review unit
		Improve **teacher performance management**	**National Institute of Education (Singapore)**: to develop a Performance Management system for the MOE.

Table 6-1 Bahrain's reform initiatives and service providers

During the early stages of implementation in 2008, the EDB and McKinsey developed a plan for a second wave of reforms; their focus shifted to improving the performance of the MOE and improving learning practices in schools (EDB, 2008a). This was portrayed as necessary to sustain the momentum of reform, and to continue to build on the previous phases. The second wave reform document (ibid) recognised that the improvement of students' performance in TIMSS 2007 was 'marginal' compared to the results of TIMSS 2003; pupils continued to perform below the international average and their average score on TIMSS declined. A more

comprehensive description and analysis of the reforms and their outcomes in Bahrain are presented in Chapter 7.

Kuwait

Kuwait was one of the first in the region to get its political independence in 1961. It has the oldest and most advanced system of political participation in the region, dating back to the pre-oil period (Ghanim, 2000). The Al Sabah ruling family in Kuwait came to power by consensus rather than conflict, distinguishing it from the ruling families in the other member states. The combination of internal and external pressures culminated in Kuwait developing a form of constitutional monarchy post-independence (Ulrichsen, 2014a). Kuwait is also one of the richest Gulf States in terms of oil reserves; resources were devoted to the modernisation of the economy and improving the living standards of the population. In conjunction with the passage of Kuwait's first post-independence constitution, a state planning board was established to direct future growth and development through a series of 5 year development plans (Tétreault and al-Mughni, 1995). This left a mark on Kuwaiti society and the country was at the time considered a leading model of development in the region.

The first boys' school was established by Kuwaiti merchants in 1911 and the first girls' school in 1936 (MOE, 2015). The Kuwaiti government took over responsibility for administering the existing schools in 1936 (ibid). At the time, Kuwait relied on teachers from Palestine, Egypt and Syria, and the curriculum was borrowed from Egypt (ibid). Kuwait was a notable model of educational development in the region, and provided financial and technical assistance to other Gulf States to develop their education systems in the early stages:

> Almost all teachers [in the region] followed the Kuwaiti curriculum (except the science classes), which at that time was widely regarded as one of the most progressive in the Arab world, and was of course culturally more acceptable and appropriate than the previously-used Egyptian curriculum. (Davidson, 2010, p. 64)

Education is compulsory and free to all Kuwaiti citizens. Education governance in Kuwait is highly centralised, with the Ministry of Education having responsibility for administering the entire system (Al Sharekh, 2017). However, its prominence in the region has regressed over the years, and it is no longer considered a role model in the region.

When were the reforms introduced and why?

Acknowledging the need to improve education and recognising global, regional and local challenges, the Kuwaiti MOE in 2003 launched its first general education strategic plan 2005-2025 (MOE, 2003). A national conference for the development of education was held in February 2008 and culminated in the document for 'Developing School-Based Education Reforms' (MOE, 2008b). The conference was preceded by two commissioned studies, the first by Harvard's Michael Cassidy, and the second by the British Council, scoping the needs of the education system in Kuwait (ibid). Both studies emphasised the need to improve the quality of the education system in Kuwait and proposed a number of initiatives aligned with the MOE's strategic plan.

How was the reform designed and implemented? Who was involved?

Kuwait's access to ample financial resources and frequent changes in government/ educational leadership have been depicted as resulting in over-borrowing and reform fatigue over the last 20 years (Winokur, 2014). The extent of these numerous reforms

is illustrated in the national report titled 'The Development of Education in the State of Kuwait', prepared by the Kuwaiti MOE for the UNESCO's IBE (MOE, 2008a). The report lists more than 40 reform initiatives including those listed in the strategic plan and in the national conference for the development of education, held in February 2008 in Kuwait (MOE, 2008b). Moreover, the country commissioned other scoping studies from Tony Blair and associates, a consulting firm (Ulrichsen, 2016), and the Singaporean National Institute of Education (NIE) (NIE, 2013), both of which argued that the quality of the education system needed improvement and suggested more reform initiatives.

Winokur (2014) noted that many of the planned reforms in Kuwait were never implemented. For example, with reference to the above-mentioned studies, Tony Blair's study was shelved when the Kuwaiti Prime Minister at the time resigned (Ulrichsen, 2016) and the NIE diagnostic was dismissed by the MOE because they claimed it was not contextualised (Al Mosawi, 2014). In this section, I focus on the reform that appears to have survived following its initiation in 2003 in cooperation with the World Bank. At that time, a team from the World Bank held a Public Expenditure Review (World Bank, 2015a), and argued for the necessity of reform on the grounds that the Kuwaiti MOE did not maintain records about the performance of the system, thus keeping track of its progress was not possible. As a result, the initial phase of reforms instigated in consultation with the WB focused on strengthening the MOE's information systems and involvement in assessments by:

> establishing national indicator reports and an Education Monitoring and Information System (EMIS) to increase the amount of reliable data, introduce alternative approaches to education budgeting and finance, and strengthen both national and international learning assessments. As the old adage goes, if you don't measure it, you can't improve it. (ibid, para. 2)

This phase was called the Kuwait Education Indicators and Assessment Project. In

the same year, the Kuwaiti MOE launched the Strategic Plan for General Education. The strategic plan document specifies that it was developed in cooperation with international consultants but it does not clearly name the World Bank, although, the strategic goals presented in the plan reflected some of the World Bank's initiatives. An example is the 11th initiative outlined under the National Conference for the Development of Education document on strengthening the educational information systems (MOE, 2008b, p. 37)

In 2010, The Kuwaiti government, also in partnership with the World Bank, launched a national reform educational reform initiative entitled 'the Integrated Reform Program' that identified the key 'reform pillars' based on a conceptual model, which is reproduced from the World Bank's report (World Bank, 2014, p. 11) in Figure 6-2.

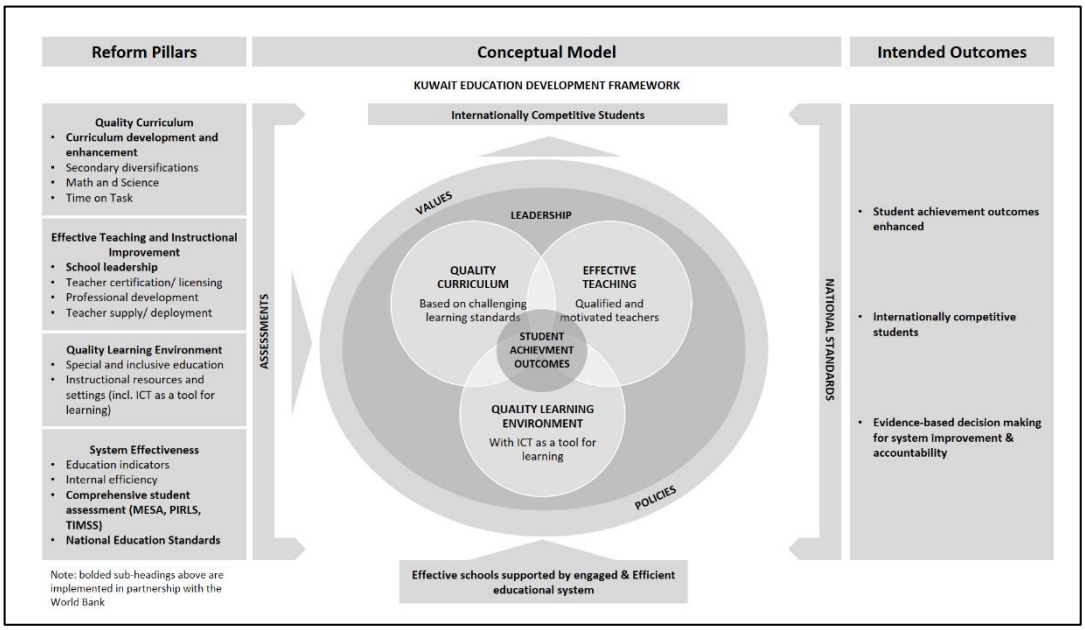


Figure 6-2 Kuwait's Integrated Education Reform conceptual model

In the same year, Kuwait, based on advice from the World Bank, re-established the National Centre for Education Development (NCED), a quasi-autonomous centre

under the MOE, with a mandate to collaborate with the International Association for the Evaluation of Education Achievement (IEA), the organisation responsible for TIMSS and PIRLS, to administer national and international assessments (Winokur, 2014). The key reform areas are outlined in Table 6-2. The implementation lasted four years until 2014, and the MOE, NCED and the World Bank cooperated to deliver these initiatives.

Area of reform	Proposed initiatives	Implementation/Providers
Quality Curriculum	• Develop an outcomes-based curriculum • Diversify secondary education • Focus on Science and Maths	**Kuwait MOE and World Bank Specialists**
Effective Teaching and instructional improvement	• Improve school leadership • Teacher certification and licensing • Professional development • Teacher supply/ deployment	**Kuwait MOE and World Bank Specialists**
Quality Learning Environment	• Special and inclusive education instructional resources and settings • Promote ICT as a tool for learning	**NCED, World Bank and IEA**
System Effectiveness	• Develop education indicators • Develop a comprehensive student assessment program (MESA) • Develop national education standards	**Kuwait MOE and World Bank**

Table 6-2 Kuwait's reform initiatives and service providers

Oman

Oman has a rich history. In the 17th century it was a powerful empire but the successive colonial wars with the Portuguese and the British weakened the state and, as it declined in power in the 20th century, it fell under British rule like the other Gulf States. Today, Oman is an absolute monarchy ruled by Sultan Qaboos since 1970; the Sultan is credited with Oman's nation building and modernisation. He introduced plans to open up the country, embarked on economic reforms, and followed a policy of modernisation marked by increased spending on health, education and welfare.

Unlike the other Gulf States, Oman is ruled by a monarch and not a ruling tribe or family (Valeri, 2011), thus many of the laws and policy changes are direct directives of the Sultan. As one of the consultants working in Oman put it:

> Much of the story of education in Oman links to the story of His Majesty [the Sultan], and his words – from the earliest years he has emphasised education and access – much because his father did not … Here of course you need to consider the presence of 2 ministries [Ministry of Education and Ministry of Higher Education], and the challenge of public policy basically coming from two sentences in His Majesty's speech to the Shura [the consultative council] (Interview with Consultant 3, 27/11/2016).

Oil was discovered in the 1960s and only went into production in the 1970s. However, Oman, like Bahrain, has modest reserves and consequently focused on diversification early in comparison with the other Gulf States. However, it still remains largely dependent on oil exports (Al-Mawali, Hasim and Al-Busaidi, 2016). Since the 1990s, the country has implemented plans to accelerate the diversification of its economy by placing greater emphasis on other areas of industry, viz. tourism and infrastructure (Hvidt, 2013). Oman's economic policy draws on a series of five-year development plans that set objectives for all government sectors and non-governmental bodies. By 1995, Oman had completed four five-year development plans and in the same year launched the 'Oman Vision 2020' which outlines proposals for the Sultanate's development over twenty-five years.

The literature on the development of education in Oman identifies three phases (Ghanboosi, 2017; Issan and Gomaa, 2010), the first focused on expansion and providing access. When Sultan Qaboos ascended the throne in 1970, the country had 3 schools, 900 students, 30 teachers and a 66 percent illiteracy rate; however, soon after the Omani 'renaissance' and the establishment of the Ministry of Education, the country assisted by international organisations and loans increased investment in educational infrastructure, and the number of schools increased within

5 years to 207 with more than 55,000 students (MOE, 2016). The second phase of development which spanned the 1980s continued efforts to provide access to schools, and shifted the focus towards the quality of provision and human resource development to meet the needs of the state; this included the provision of scholarships and the development of a national curriculum (Rassekh, 2004). By 2016, the Sultanate recorded a 98 percent net enrolment ratio and is progressing well to achieving Education for All goals (The Education Council, 2016)

When were the reforms introduced and why?

The 1990s marked the beginning of the third phase and the launch of the K-12 educational reforms. New priorities emerged as a result of a number of reviews. International organisations such as the World Bank and UNESCO urged Oman, as a developing nation, to shift the focus away from access and provision towards quality, and to prepare for a knowledge-based economy (Ghanboosi, 2017). The developments that took place in this stage are the most comprehensive reform attempt in the country.

In 1995, a national conference entitled 'A Future Vision for the Omani Economy – Vision 2020' set out a comprehensive development strategy to develop the economy, education and social services (MOE, 2004). The development of the Basic Education Reform was instigated with the support of the World Bank (Donn and Al Manthri, 2013). In 1994, the MOE collaborated with the Scottish Qualifications Authority (SQA), and later the World Bank, to evaluate the education system. This exercise recommended reforms in various areas. The MOE adopted the reports' recommendations into a strategy for reform aligned with the national vision 2020 (Nasser, 2019).

Thus, Oman was one of the first in the region to initiate a comprehensive national educational reform in 1998. The reforms were introduced in line with the fifth developmental plan (1996-2000) and Oman's 'Vision 2020'. The aim was to redesign the general education system through the Basic Education Reform. The redesign was done in cooperation with the Canadian company Education Consultancy Services (Al Balushi and Griffiths, 2013). It was comprised of two cycles (grades 1-4 and grades 5-10). One of the main reasons behind the new structure was to reduce the early dropout rate (Rassekh, 2004), as dropout rates in Oman were significant in Grades 7-9 (MOE, 2004).

How were the reforms designed and implemented? Who was involved?

The new system was developed around an updated curriculum that was designed to include relevant knowledge and skills that would ultimately prepares Omanis for the workplace and the global economy. Many of the elements promoted in the reforms - such as the focus on STEM subjects, technology and the shift away from teacher-centred education - were based on global 'best practices' (MOE, 2004). In addition to the curriculum, student assessments were also reformed with the SQA in 1996 and school assessments were developed based on advice from the British agency for schools inspection in 2004 (Ofsted) (Al-Mahrooqi and Denman, 2017; Ghanboosi, 2017; Zamili, Al-Ssulamani and Al Ani, 2012).

In 2000, the Ministry of Education collaborated with the Centre for British Teachers (CfBT) to reform the next stage of the education system 'post-basic education reform' (grades 11-12). CfBT was tasked with developing the curriculum and assessment models (Al Balushi and Griffiths, 2013). The new post basic

education system was implemented in 2007 (Issan and Gomaa, 2010). The reform initiatives are outlined below in Table 6-3.

Throughout the phases outlined above, the World Bank has been a key player. At the beginning, The World Bank was a donor and when Oman graduated from the World Bank's lending scheme in 1991, it became an advisor. As with the other countries in the Gulf, Oman sought the assistance of international organisations and consultancies in developing the reform strategy.

Area of reform	Justification	Proposed initiatives	Implementation/ Providers
Basic Education **(grade 1-10)**	The need to include relevant knowledge and skills-based content that would help Omanis for life and work and encourage them to engage in life-long learning Reduce dropout rates	Restructure the general education system into: • Cycle one (grades 1-4) • Cycle two (grades 5-10)	**Education Consulting Services (Canada)** assisted the Omani Ministry of Education in redesigning the basic education system
Post Basic Education **(Grade 11-12)**	Prepare school graduates for higher education, the labour market and modern life generally	Restructure the general secondary school level into grades 11 and 12 Reform the secondary curriculum and assessment methods	**CfBT (UK)**
Student Assessments	Change the way in which students are assessed from focusing on rote learning and memorisation to an assessment of higher-order thinking skills	Train MOE staff on how to develop Devise specifications at all grade levels and introduce wider ranging assessment instruments Match between assessment and the curriculum	**SQA (Scotland)**
School Assessments	Improve the schools' outcomes and reach a high level of competency and effectiveness	To achieve this the MOE implemented two methods: • Self-evaluations • External evaluations	**Ofsted (UK)**

Table 6-3 Oman's reform initiatives and service providers

Qatar

Qatar holds one of the world's largest natural gas reserves and is the single largest supplier of liquefied natural gas (Wright, 2011); with its small population of locals, Qatar has the world's highest GDP per capita. The Al Thani family rule Qatar. Unlike other Gulf ruling families, they have been the only substantial source of political power, whereas in Kuwait merchant families and in Saudi Arabia religious establishments have formed positions of secondary political power (Nolan, 2012). Due to Qatar's ample hydrocarbon wealth and relatively small native population, the Qatari government faces few financial restraints and limited social pressures, thus it has been relatively easy for the country to provide a range of generous welfare benefits to its citizens, including free education and healthcare and subsidised utilities. Indeed, as with the other rentier Gulf States, public sector employment is usually included as a generous welfare benefit. In 1995, a bloodless coup to unseat the aging Emir[20] by his son marked a crucial moment in Qatar's contemporary history. The new Emir initiated a number of reforms. In 2003, Qatar became a constitutional monarchy, and the constitution provided for an elected consultative council. However, elections have been repeatedly delayed since (EIU, 2019b). In many ways the reforms in Qatar were purely elite-driven and the product of leadership change, and were not generally viewed as a product of external or internal pressures (Wright, 2011).

In terms of education, Qatar was a late starter in the region. The first formal school opened in 1948 and the first public school for girls was opened in 1956. Government support for a publicly funded formal education system began in 1951

[20] The title given to the ruler of an Emirate, such as the leader of Qatar.

(Brewer *et al.*, 2007). In 1956, the Ministry of Education was founded, marking the beginning of several educational initiatives on a national scale. At the time, the Ministry relied on the Egyptian curricula and schools were staffed by Arab persons regardless of their nationality (IBE, 2011a). Today, Qatar has successfully expanded education provision through free education to all citizens, and reduced illiteracy to 9% in 2004 (Brewer *et al.*, 2007). The rapid expansion diversified the background of teachers employed in Qatari schools, According to the educational statistics of 2015, 73 percent of school teachers in Qatar were foreigners (GCC-Stat, 2018).

When were the reforms introduced and why?

In 2001, the Emir appointed the RAND Corporation, an American think tank, to evaluate the education system and propose education reforms that would enable the country to meet 21st century needs (Zellman, Constant and Goldman, 2011). The Emir believed that the education system was not providing students with the necessary skills for the labour market and that the education system was rigid, out-dated, and resistant to reform (Brewer *et al.*, 2007). In the same year, RAND presented their findings to the country's leadership and the strategy for reform they presented was based on four principles that embody key market-oriented approaches to education policy, viz. increasing autonomy, accountability, variety and choice. RAND suggested a reform strategy with two layers: one focused on the organisation and governance of the education system, the other on specific elements within the system. As in the case of the other Gulf States, the suggested strategy was based on purchasing foreign examples of 'best practice' (ibid, pp. 47-55). The phases are described below.

A team from RAND, who described their role as 'overseeing the project', performed an analysis of the education system (Brewer *et al.*, 2007). This took the form of a short scoping exercise that lasted nine months from September 2001 until May 2002. RAND worked with a local coordinating committee comprising senior Qatari decision-making officials in this phase. The evidence was gathered through observations of schools and ministries, interviews with relevant individuals and an analysis of documentation.

RAND presented its findings as a 'confirmation of weaknesses' (Brewer *et al.*, 2007, p. 37), referring to the Emir's statement of concerns identified at the outset. They identified the main problems as the:

- **The Ministry**

  The Ministry was seen to lack vision and to support unsystematic growth. Its hierarchical approaches did not foster innovation and the internal and external reporting and communication lines were not clear.

- **The Curriculum**

  The curriculum was deemed out-dated and unchallenging. The delivery was centrally controlled with little room for teachers to control how the curriculum is taught.

- **Schools**

  Schools were considered to be lacking in autonomy and accountability. Investment in basic infrastructure and essential elements was considered poor.

- **Teachers**

Teachers' pay and incentives were low. The Teachers' Allocation Policy was poor and teacher training and professional development needed improvement.

RAND urged the leadership to consider a structured and systematic change in order to build a 'world-class' K-12 education system.

How were the reforms designed and implemented? Who was involved?

In January 2002, RAND was tasked with identifying solutions that would address the problems they had identified. Their approach was two layered. On the 'overarching level', they recommended that the 'system of governance' must change regardless of the reform initiatives proposed in the second layer because reform required changes to the system's behaviour that must be institutionalised and supported for a long period of time to guarantee visible results (Brewer *et al.*, 2007, p. xix). The three alternative options they proposed are shown in Figure 6-3 below.

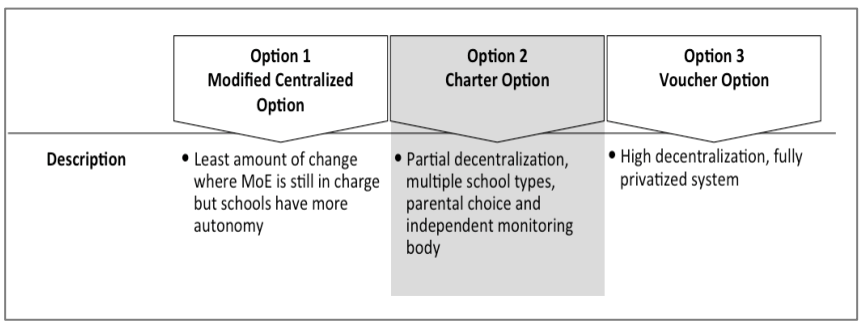


Figure 6-3 Qatar's reform governance Options

Of the three options, the Qatari leadership selected the second one (later renamed 'independent schools'), as it allowed the government continued control of schools, and could form a first step towards moving to option three. The second layer of reform focused on:

- Monitoring and evaluation mechanisms to assess the performance of the students and the system;
- International benchmarked curriculum standards;
- Professional development options for teachers.

Implementation began in 2002; the choice of the second governance option meant that the whole system had to be restructured to support the new government-funded independent schools. RAND argued that success also necessitated an institutional reorganisation (Brewer *et al.*, 2007, p. 91) and in November 2002 the Supreme Education Council (SEC) was established and given legal authority over the MOE, making the latter an operator of schools while the former became the policy making entity (Qatar Legal Portal, 2018). The SEC was also given the responsibility of establishing curriculum standards and national assessments. Implementation started with a pilot of independent schools. Table 6-4 below summarises the reform initiatives, why they were introduced, and who from the GEI was contracted to deliver them.

Area of reform	Justification	Proposed initiatives	Implementation/Providers
Ministry	…was unable to deliver the proposed reform	Restructure the system and create: • Supreme Education Council (SEC) • Evaluation Institute • Education Institute	**RAND (USA)** assisted the government in establishing and supporting the new institutions
Schools	… were underperforming and lacked the autonomy to improve	Introduce independent schools using the American model of charter schools as a reference Select independent operators through open-competition for contracts	Multiple international school operators for the first phase, including: • **Multiserve (NZ)** • **GTZ (Germany)** • **Mosacia (US)** • **CfBT (UK)**

		Develop regulatory framework for independent operators	The **Charter Schools Development Centre (USA**) was asked by the SEC to support the education institute
Curriculum	… was below expectations	Develop international curriculum standards for core subjects (Arabic, English, Maths and Science)	**CfBT (UK)**: to develop the curriculum standards for the core subjects: Arabic, English, Maths and Science.
		Introduce unified national testing in core subjects.	**ETS (USA)**: to develop national assessments for Arabic and English **CTB (USA)**: to develop national assessments for Maths and Science
Teachers	Improve teachers' professional development	Introduce training opportunities for all teachers	**CfBT** appointed jointly with the **University of Southampton**[21] Independent School Operators

Table 6-4 Qatar's initiatives and service providers

Saudi Arabia

Saudi Arabia is an absolute monarchy governed by Islamic principles. Executive and legislative powers are exercised by the King and the cabinet, and by a consultative council which was established in 1997 (Dekmejian, 1998). The consultative council was given more power in 2003 following a public petition (Al-Dakhil, 2008). The council functions as part of the country's legislature, albeit in an advisory capacity (Parolin, 2006).

Since the 1970s, the country guided its development through medium-term (5 year) plans that set out the national goals and aspirations for the country's development (MEP, 2019). Oil, which was discovered in 1938 in large reserves,

[21] CfBT jointly with the University of Southampton were selected to deliver the initial teacher training programme, however, the programme was discontinued after the first year because of 'implementation challenges' and the SEC sought alternative options through independent school operators (Brewer, et al., 2007, p. 108).

made Saudi Arabia the world's largest oil producer and exporter; the country has the 2nd largest oil reserves in amongst the countries of the Organisation of the Petroleum Exporting Countries (OPEC) (OPEC, 2018). With the prestige it enjoys as custodian of the birthplace of Islam and as major oil producer, the country has significant Arab and global political weight: it is the only Arab country which is a member of the G20. In addition to its membership in the GCC, it is also an active member of the Organisation of Islamic Cooperation.

The modern Saudi system of education dates back to 1924/25 when King Abdulaziz, the founding king, decreed the establishment of the Directorate of Knowledge (MOE, n.d.). Before that there was a traditional educational schooling system on the Arabian Peninsula called the 'Kuttab' where students went to learn to read and write Arabic and memorize the Qur'an. Kuttab schools were located throughout half of the Arabian Peninsula during the 19th century with the exception of the western and eastern parts which were still ruled by the Ottoman Empire during the 19th century (Wiseman, Sadaawi and Alromi, 2008). It was not until the Kingdom of Saudi Arabia was founded in 1932 that a comprehensive national system of education was set up (Oliver, 1987). Throughout the 1930s and 40s, the Directorate of Knowledge established schools, issuing the first elementary curriculum in 1934. However, by 1947 there were only 65 schools enrolling exclusively 10,000 male students (ibid).

Major expansions and improvements took place in the early 1950s when the Ministry of Education replaced the Directorate of Knowledge (MOE, n.d.) and the kingdom's revenues increased from the vast oil resources. The first government school for girls was established in 1961 (Hamdan, 2017) and, by the end of the 1990s, girls' schools had been established in every part of the Kingdom. Today,

female students make up over half of the more than 6 million students currently enrolled in Saudi schools and universities (Saudi Arabia Embassy, n.d.).

Two factors in particular set Saudi Arabian education apart from the other Gulf States. One is the large 26.8 million population with increasing numbers of young children entering the school system. The other is the intense focus on the teaching of Islam, which is more pronounced in Saudi Arabia than in other Gulf States (Smith and Abouammoh, 2013).

When were the reforms introduced and why?

A number of critical events that occurred around the turn of the 21st century has affected the Kingdom, most notably the September 11, 2001 terrorist attacks in the United States and the May and November 2003 terrorist attacks in the Kingdom (Al-Dakhil, 2008). The rise of terrorism appears to have had the most influence on reforms in Saudi Arabia. The year 2003 was described by Al Dakhil as 'the year of reform par excellence':

> 2003 witnessed not only a growth of literature on reform unprecedented in size and boldness, but also the government's announcement of several reforms. (Al Dakhil, 2008, para. 1)

The reforms followed a petition to the King, signed by Saudi intellectuals, and resulted in a number of political and structural changes. The country's religious-based education system came under scrutiny, and it was this that pushed the Saudi government to overhaul the state education system and its curriculum (Courington and Zuabi, 2011, p. 141). However, as Prokop (2003) argues, directly reforming the religious focus of the education system created resistance, thus, the acceptable alternative motive publicised and promoted by the country's leadership was the economic necessity for educational reform.

In the same year, King Abdullah laid the foundations for a national reform of the general education system in Saudi Arabia in his presentation of 'the education charter' which was a response to the 7th development plan (2005-2009). The reforms aimed to invest in Saudi youth and prepare them for the labour market. Wiseman, Alromi and Alshumrani (2014, p. 17) argue the foundations of the reform were grounded in human capital theory.

How were the reforms designed and implemented? Who was involved?

The 'education charter' paved the way for the launch of the King Abdullah Bin Abdul Aziz General Education Development Project (Tatweer),[22] an ambitious $22 billion project that was developed as a five-year initiative (2008-2012) by the MOE, with the assistance of international advisors (Tatweer, n.d.-a). The 'centrepiece' of this project was its transformation into a holding company, under the same name, owned by the multibillion-dollar Saudi Public Investment Fund, with the intention of forming partnerships with international companies to develop an education industry, curricula, teacher training and technology for smart schools (Allam, 2011). This transformation was justified by Saudi officials as a move that would sustain the reforms beyond the project's initial five year lifespan; however, Nolan (2012) argues that establishing Tatweer should be seen as a 'bureaucratic manoeuvre' to circumvent the rigidity of the MOE, which was controlled by Islamic groups.

Tatweer was then established as a company in 2008, and tasked with overseeing educational reforms. The company was given the authority to establish subsidiaries and, in 2012, Tatweer for Educational Services (T4edu), was established

[22] Tatweer in Arabic means development.

as a Saudi company wholly owned by the government and a subsidiary of Tatweer Education Holding Company (T4edu, 2019a).

Subsequently, T4edu was identified as the ‘strategic partner’ for all the reform initiatives listed in Table 6-5 below. T4edu in turn commissioned specialised local and international education businesses and consultancy firms for the design and implementation of these initiatives.

Project’s main axis	Programs
Professional Training of teachers	• Professional development of teachers. • The National Centre for Professional Development. • The development of school leadership programme • The development of science and mathematics education programme. (Blended Professional Development Program Tamkeen) • The development of English language teaching and learning programme.
Curriculum development program	• Early childhood education development program. • English language teaching development curriculum program. • Computer Education and Information Technology development program
Improving learning environment program	• School development programme. • Special education development programme. • Organizational restructuring programme. • Excellence in education programme. • The national education portal development programme. • Digital education resources programme. • E-school programme. • Digital support materials development programme.
Supporting extra curricula classroom activity program	• Scientific centres development programme. • Neighbourhood schools vlubs program for educational and recreational activities. • School sports development programme. • Health promotion and healthy life style programme. • Enhance 21st Century skills, life and labour market skills.

Table 6-5 Saudi's reform initiatives

Figure 6-4 below is a captured screenshot of the T4edu partner’s page which lists more than 50 different companies (T4edu, 2019c).

Figure 6-4 Saudi's service providers

In 2013, Tatweer published a comprehensive education strategy (Salman, 2013) which was developed in partnership with the Boston Consulting Group (BCG), an American multinational management consultancy firm. The new strategy was designed to enable the country to develop a new generation of Saudis capable of participating in the transformation of their country. The strategy incorporated lessons learnt from past improvement experiences in the country, and leveraged global best practices to chart a new path forward for education (Tatweer, 2013).

The Strategy document included an appendix summarising a SWOT analysis[23] of the Saudi education system, in which 27 weaknesses were identified against a background of:

- Increasing student numbers,
- Low quality of new teachers,
- Resistance to change,
- The exaggeration of the education system's weaknesses in the media,
- Low quality providers of early childhood education affecting quality of students entering general education and
- The difficulty in attracting talented individuals. (ibid)

However, the document also identified opportunities such as the availability of financial resources, increased awareness of the importance of education, increased private sector involvement, involvement of women and the existence of the King Abdulaziz Centre for National Dialogue.[24] This diagnosis was also validated through

[23] A SWOT analysis is a study undertaken to identify internal Strengths and Weaknesses, as well as its external Opportunities and Threats.

[24] Instituted in 2003, to debate reform and suggest remedies following several events and the public petitions to the King to acknowledge diverging opinions in the Kingdom.

international benchmarking, to identify through the design phase what the ‘quick wins’ could be (ibid).

One of the key initiatives of the reforms was the merger of the Ministry of Education and the Ministry of Higher Education in 2015 (MOE, n.d.). The merger project, known as ‘Reinventing Education in Saudi Arabia’, was overseen by T4edu who commissioned BCG to design and implement the restructuring of the education system (Tatweer, n.d.-d). The aim of the merger was to strengthen the employability of graduates, develop qualified teachers, and improve system-wide efficiency (BCG, 2019). The project was carried out in three phases, which mirror those of the reforms in Bahrain and Qatar: a diagnostic phase, design phase and implementation phase. The diagnostic phase revealed that

> many high school graduates were ill-prepared for college or a career: 90% of students needed a foundation year before enrolling at a university, and youth unemployment was high. There were highly variable passing rates on national exams among schools, and teacher development needed significant improvement. The education systems in Saudi Arabia were also misaligned; the general, vocational, and higher education systems each pursued divergent strategies. (ibid, n.d.)

In addition to Tatweer, Saudi Arabia established the Public Education Evaluation Commission (PEEC) in 2013, later renamed to the Education and Training Evaluation Commission (ETEC), as an independent entity that reports directly to the Council of Economic and Development Affairs of Saudi Arabia on the performance of the education system in Saudi Arabia (National Center for Assessment, 2019). The commission also developed standards of professional accreditation for school principals in the light of universal standards (ibid). In 2014, the commission partnered with the UNDP to improve its capacity (UNDP, 2019a). Although this commission is not directly linked to ‘Tatweer’, it reflected the

emphasis in the strategy on system performance management and has been recognised as one of the key educational reforms in Saudi Arabia (Al Essa, 2009).

United Arab Emirates

The United Arab Emirates (UAE) stands among the Gulf monarchies as the only federal monarchy comprising seven emirates: Abu Dhabi (AD) – the largest and the federal capital – Dubai, Sharjah, Ajman, Umm Al Quwain, Ras Al Khaima and Fujairah. Each of these emirates is ruled by a different ruling family.

> By convention, the ruler of Abu Dhabi has held the post of President of the UAE, albeit subject to election by the Federal Supreme Council every five years, while the position of Prime Minister has been held by the Ruler of Dubai (Ulrichsen, 2017b, p. 44).

The Federal Supreme Council (FSC), founded the same year as the UAE's in 1971, is the highest legislative and executive authority; it determines the general policy of the country and is comprised of the seven rulers of the emirates. In addition, four other federal authorities exist as outlined by the constitution originally drafted in 1971 and made permanent in 1996. These are the cabinet, which is the country's executive authority; the Federal National Council (FNC), established in 1972 as a consultative body and is part of the country's legislature; and finally the Federal Judicial system (Government.ae, 2019b).

Abu Dhabi and Dubai are considered the 'two poles of political and economic gravity in the UAE' (Ulrichsen, 2017b, p. 7). Abu Dhabi constitutes 87 percent of the country's area and has the largest oil reserves. The GDP of Abu Dhabi for the year 2014 was 960,146 million Emirati Dirhams – around 262 million US Dollars (at current prices), over twice the size of Dubai's GDP of 338 million Emirati Dirhams – around 92 million US Dollars (Government.ae, 2019a).

The country's modernisation over the last two decades has been impressive: Dubai's successful economic diversification and Abu Dhabi's state branding and foreign policy directions have given the UAE a recognised global position.

The history and development of formal education in the UAE is similar to that of the other Gulf States. Much of the rapid development occurred after the UAE's independence from Britain and union which coincided with the increase in oil revenues. Between 1971 and 1977, the MOE used for all educational levels the syllabi developed in Kuwait until a national curriculum reflecting UAE identity was developed in 1977 (IBE, 2011b); many schools were also staffed by Egyptian teachers (Lootah, 2011). Today, education is free and mandatory and, in 2011, the UAE's budget allocation for education and social development increased to by 46 percent of the federal budget (Warner and Burton, 2017).

At the federal level, the Emirati MOE handles all stages of education in the UAE including schools, colleges, universities and post-graduation programmes. Higher education also comes under the umbrella of the MOE, though until government restructuring in 2016 it fell under the remit of a dedicated Ministry of Higher Education (Government.ae, 2018b). At the local level, education is managed through local authorities and branches of the MOE, known as educational zones. After the introduction of the educational reforms of 2005, Abu Dhabi and Dubai established independent authorities to regulate education at the emirate level: in Abu Dhabi Department of Education and Knowledge (ADEK) and Dubai's Knowledge and Human Development Authority (KHDA).

Education in the UAE has been given a top priority position on the government's agenda since 2000 when the MOE launched the 'Education 2020' strategy. The importance of the education system was further reinforced in 2010 with

the launch of the country's Vision 2021, which designated education as one of the key core elements:

> The UAE Vision 2021 National Agenda emphasizes the development of a first-rate education system, which will require a complete transformation of the current education system and teaching methods. The National Agenda aims for all schools, universities and students to be equipped with Smart systems and devices as a basis for all teaching methods, projects and research. There will also be significant investments to promote and reinforce enrolment in preschools as this plays an important role in shaping children's personalities and their future. (UAE PMO, 2018, para. 2)

The MOE's 'Education 2020' strategy, which is a series of ambitious five-year plans, was designed to bring significant qualitative improvements to the education system. Similar to the other strategies in the region, 'Education 2020' was 'benchmarked' against leading global systems such as those of Finland, the United Kingdom and the Asian Pacific region (Amin-Ali, 2017). The strategy aims at delivering a student-centred model focused on improving student learning outcomes (IBE, 2011b).

Thorne (2011) argues that reforms in the UAE are a relatively recent phenomenon with little systematic documentation as yet; and that the UAE is suffering from what he terms 'policy hysteria', whereby waves of reform are being introduced in a short time span, seemingly in an effort to find the magic recipe for success (ibid). Moreover, Abu Dhabi and Dubai have launched separate economic visions and education strategies, leading to numerous educational reform initiatives over the last two decades (Al Qutami, 2011). The task of documenting and analysing these efforts is beyond the scope of this study. However, I found that Abu Dhabi's reforms are more publicised and better documented, and consequently addressed more widely in academic literature. I focus in this section on Abu Dhabi's educational reforms of the K-12 system.

When were the reforms introduced and why?

The Emirate of Abu Dhabi has embarked on an ambitious journey to take its place in the world as a leading knowledge economy, and a strong educational framework has been recognised as instrumental to meeting the development goals of the Emirate (Badri and Khaili, 2014). In 2005, Abu Dhabi's Education Council, later renamed the Abu Dhabi Department of Education and Knowledge (ADEK), was established to manage and regulate the education sector in the emirate and was tasked with elevating the quality of education to the highest international standards (ADEK, n.d.-a).

Since its establishment, ADEK has led the educational reforms efforts starting with an analysis of the current status of education in the emirate for the development of a comprehensive education strategy. The key challenges identified at the early stages of planning motivated an 'aggressive' educational reform of the entire education system in the emirate (Badri and Khaili, 2014, p. 203).

Initial concerns specified that the students were not being well-served by the education system and were graduating without the academic proficiency necessary to achieve success in post-secondary education or in the rapidly expanding Abu Dhabi labour market. These concerns were further exacerbated as nearly 100 new public schools and about 100 new private schools were needed by 2018 (ibid, p. 201). Thus, in 2006, ADEK undertook a broad-based examination of Abu Dhabi's kindergarten through Grade 12 education systems through a comprehensive SWOT analysis. The analysis, in which three taskforces were created for each of the education levels comprising of stakeholders, partners, consultants and expert scholars from all over the world, took more than a year to complete (ibid, p. 203). The main findings

revolved around a set of challenges, identified through studies conducted by international consultancies, as summarised in Table 6-6 below.

Challenge Area	Description	Study
Students performing below grade level	• Students perform poorly in English, Arabic , Mathematics and Science • Students entering higher education are not prepared	2006 – Australian Council for Educational Research 2008 – Pearson
Quality of teachers	• Teachers do not have the skills to deliver best-in-class curricula • Teachers do not have the right qualifications and are not proficient in English	2008 – Diagnostic by ADEK
School governance	• Governance system of schools is poorly defined • Private public partnerships management perceived a lack of clarity in the division of authority and responsibility	2008 – Diagnostic by ADEK
Quality of public schools principals	• Low overall readiness of school principals, lack of qualifications and training	2008 – Australian Department of Education and Training
Teaching time and hours of instruction	• Teaching time in ADEK schools was below OECD average	2008 – Diagnostic by ADEK
Teachers professional Development	• Teachers had few professional development options	2008 – Diagnostic by ADEK
School Infrastructure	• Schools in in AD were 'unacceptable': no accountability mechanism, limited funds for infrastructure, old buildings, classrooms overcrowded and lacked modern equipment and supplies and poor classroom configuration	2007 – MGT of America 2008 – Diagnostic by ADEK
Curriculum standards	• Standards were not clearly defined	2008 – Diagnostic by ADEK
Education data, standards and decision making	• Lack of data for sound decision making • Need for quality indicators and inspections	2008 – Diagnostic by ADEK
Language of instruction	• Arabic and English literacy is badly taught	2008 – Diagnostic by ADEK
Quality of private education	• Quality private education is not affordable to large communities of expatriates	2008 – Diagnostic by ADEK

Table 6-6 Education Challenges in Abu Dhabi

Overall, these challenges were further distilled in the following articulation by Lynne Pierson, ADEK's Director of K-12 education, who argued that students lacked the skills and competencies needed to compete successfully in the globalised world:

> Abu Dhabi students must be more competitive and prepared to take their place in a knowledge-based society and economy. To establish Abu Dhabi's international leadership, our schools must prepare all students to be productive in the world marketplace. (Pierson, 2011, pp. 18-19)

How were the reforms designed and implemented? Who was involved?

The first set of reforms in Abu Dhabi begun in 2006 under a Private Public Partnership (PPP) model, which allows foreign consultants to bid for advisory 'rights' to school (Dickson, 2012). The reform efforts culminated in the launch of the ADEK's 'P-12 strategic plan' in 2009. The plan, which was developed with BCG, defined the reform priorities to be addressed over a period of 10 years (see Figure 6-5 below, reproduced from ADEK's strategic plan (ADEK, 2012, p. 1)).

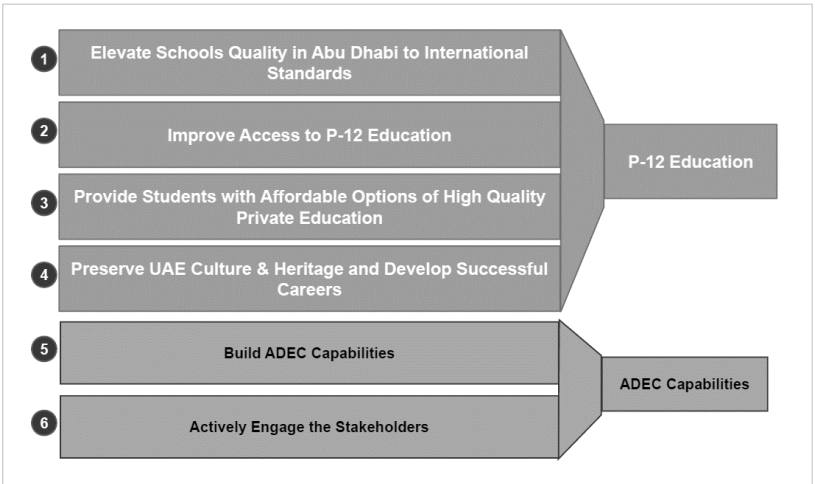


Figure 6-5 ADEK's Priorities to Elevate Education Quality

The strategic plan was designed with both long-term goals and immediate interventions. The long-term aims address the capabilities of school leaders and teachers; the curriculum; students' assessment system based on local and international standards; schools monitoring/ inspection system for public and private schools; schools' facilities; attracting and expanding quality private schools, and targeting special needs education. Immediate interventions were designed to ensure that graduates were equipped to pursue quality higher education; these included: enhancing principals and teachers' capabilities, focusing on improving English

language and maths skills, preparing students for university entrance exams, enforcing school discipline and attendance and adopting an 'aggressive assessment program' (ADEK, n.d.-b).

At the heart of this plan is a set of policies that serve as the foundation for implementing the 'New Schools Model' (NSM) which aims to change teaching and learning in all schools to improve students' outcomes (Pierson, 2011). The NSM, launched in 2009, was phased into all education institutions from Kindergarten to Grade 12; the first implementation took effect in the academic year 2010/11 and was rolled out over a period of 6 years. Within this model, a new curriculum and new teaching methods were introduced to enhance student performance by developing the student as a communicator, a thinker and a problem solver (ADEK, n.d.-c). As with other reform initiatives in the Gulf, the NSM's reforms were implemented with the assistance of international partners as illustrated in Figure 6-7 below.

Area of reform	Justification	Proposed initiatives	Implementation/Providers
Teaching and Learning	Encourage a student centred approach Enhance student performance	Introduced a 'New Schools Model' that promotes a child-centred environment and standardisation of curriculum, pedagogy, resources and support	**ADEK** (based on the P-12 strategic plan developed with the **BCG**)
Curriculum	Curriculum was textbooks and the standards were not clearly defined Students lacked language skills	Developing students' Arabic and English skills through the use of Arabic and English teachers jointly planning and teaching classes Introduce and outcomes-based curriculum	**ADEK** enlisted **Teach Away**, a recruitment agency, in 2009 to recruit teachers mainly from the USA, Canada, UK, Australia and New Zealand. **The New South Wales Government (Australia)** assisted the ADEK in developing the new outcomes-based curriculum
Teachers	Teachers needed skills to deliver best-in-class curricula and	Supporting teachers through curriculum guides, teacher resources, and on-going	ADEK developed PD Programmes with: • **CfBT (UK)**

	qualifications to be proficient in English	professional development	• **Cognition Education (New Zealand)** • **GEMS Education Solutions (UAE)** • **Nord Anglia Education (UK)** • **SSAT, Vanderbilt University, and the University of Florida (USA)**

Table 6-7 Abu Dhabi's reform initiatives and service providers

Implementation began in 2010, when the NSM introduced a new outcome-based curriculum (Farah and Ridge, 2009). Great emphasis was placed on language skills, justified by the need to improve the English language skills of the students so that they avoid a time-consuming foundation year upon entry into university (Ridge, Kippels and Farah, 2017). The plan was to teach mathematics and science at primary level through the medium of English. As many of the teachers in the schools' system in the Emirate lacked the language skills to teach subjects in English, ADEK relied on expatriate native English-speaking teachers to teach the new curriculum. When appropriate, Arabic Medium Teachers (AMTs) and English Medium Teachers (EMTs) were encouraged to plan lessons together to promote cross-disciplinary and cross-linguistic learning (Thorne, 2011).

Professional development activities were offered to teachers by ADEK in accordance with international standards and best practices and were delivered by a number of different providers from around the world (Al-Taneiji, 2014).

6.2 Discussion

Table 6-8 below summarises and compares the major K-12 educational reforms across the six countries based on the analysis presented in this chapter. As can be seen, they share a strong degree of commonality; they all began around the turn of the millennium; they were coordinated at the highest national level and sponsored by a member of the ruling elite, in many cases outside the MOE's remit; they hired a lead external agency from the GEI to design and implement the reforms; and a second level of education businesses and consultancies, termed here 'international partners', were hired to deliver aspects of the reform initiatives. All of the reforms were justified by the need to improve the quality of the education systems to meet economic aspirations and they were all based on purchasing the 'best practices' identified in systems that performed well in international student assessments.

	Bahrain	Kuwait	Oman	Qatar	Saudi	Abu Dhabi (UAE)
When	**2005**	**2003**	**1998**	**2001**	**2007**	**2005**
Why	Increase the skill level by developing education and training to strengthen effectiveness in the labour market	Improve the quality of education	Invest in human capital and equip Omanis with the necessary skills to participate in the labour market to ultimately achieve the country's economic vision	Qatar's future economic success will depend on the ability of the people to deal with a new international order that is knowledge-based and extremely competitive	Improve the skill levels of Saudis to participate in the labour market; Invest in human capital	Elevate the schools' quality to international standards
What	Teachers' and school systems' performance management	Curriculum development, teaching and school leadership, strengthening the NCED and its assessment capacity, and developing national standards	Changing the schooling structure, curriculum and assessment; changing the MOE structure; teacher training	New governance institutions; More school autonomy	In addressing primary and secondary education, the Kingdom has introduced a policy of tatweer, which means 'reform'; Tatweer is a holding company that invests in education and is given the mandate to implement the reform strategy	Comprehensive new schools model reforming what and how the student is taught in the classroom
Who	EDB and McKinsey & Company	MOE, NCED and the World Bank	MOE and the World Bank	Supreme Education Council RAND	MOE, Tatweer and international partners	ADEK and International Partners

Table 6-8 K-12 Education Reforms in the Gulf

The analysis in this chapter highlights five key features observed in the approach to education reforms in the Gulf States:

First, the reason for introducing the reforms revolved around the perceived need to improve the quality of the education systems, invest in human capital, to meet the needs of the 21st century and realise the national economic vision of diversifying away from oil towards a rapidly growing knowledge-based economy. It appears that, in the Gulf, the main goal of schooling has become reliant on the belief, articulated by OECD Education Director Andreas Schleicher 'that your education system today is your economy tomorrow' (Coughlan, 2013). This is in turn based on research which claims to have identified a causal connection between investment in education and economic development (Hanushek, 2002; Hanushek and Kimko, 2000). This claim is adopted and promoted by GEI actors and is evident in their reports analysed at the three different levels in Chapter 4. The social and political issues affecting education systems in the region were downplayed or ignored as discussed in Chapter 5.

Second, the portrayal of poor educational quality/standards is justified by comparing the performance of the national education system against international educational league tables and rankings in standardised global tests like TIMSS and PISA. As part of the shift towards the globalisation of educational governance, such tests have been viewed as important, reliable and valid comparative indicators of educational quality and of the quality of a country's human capital formation. As with any investment, 'accountability systems' have become the means by which investment in education is measured (Spring, 2009). Morgan (2017) demonstrates the reliance on these measures in the Gulf and in the next chapter, I will illustrate how

these have become the key national performance indicators which are built into the national economic visions in all Gulf States.

Third, the reform strategies analysed in the previous section centre on using an ‘essentialised’ form of policy borrowing which involves purchasing from the GEI a range of products that are described as ‘best global practices’. These are portrayed as the sources of success in education systems that performed well on international tests of pupil achievement; a technique promoted in the belief that the causes of high performance have been successfully identified; transfer is unproblematic; and will yield results quickly. Policy borrowing and transfer in the Gulf present a model that is distinctive. It is clearly not a political act of legitimisation for either pre-existing or contested reforms, nor is it an act of symbolic referencing as suggested in the contemporary literature. In the Gulf the policy borrowing process appears to provide the product both marketed and sold by the GEI. In addition, whilst the reforms are government-initiated, they are led by private sector consultants and implementation is dependent on a host of subcontractors from the GEI. Thus, despite the apparent voluntary initiation and genuine intent to reform, non-state actors dominate the process just as in coercive policy transfer situations. As Dolowitz & Marsh note:

> The role of international consultants makes less clear the distinction between voluntary and coercive transfer. For example, while consultants may ‘force’ a uniform model of market reform upon developing nations, if they are hired by a government, either as the agent of an international aid agency or ‘independently’, such a situation clearly has elements of both voluntary and coercive transfer. (Dolowitz and Marsh, 2000, p. 11)

Fourth, commercial consultancies from the GEI are employed to play a central role in diagnosing the performance of the education systems, proposing strategies for reform and products for transfer, managing their implementation, and evaluating progress. This represents an extreme case of the export of ‘statework’ to the private

sector (Ball, 2009). The central role of external consultants and international organisations such as McKinsey, RAND, BCG and the World Bank is illustrative of this. The services they provided meant that they were engaged in all stages of the policymaking process, effectively operating as part of a 'shadow education ministry'. This role allowed the lead consultant not only to sell its services, but also gave it power to influence what was subsequently purchased from whom. As outlined in Tables 6-1, 6-2, 6-3, 6-4, and 6-7, the implementation of the borrowed processes and policies are subsequently outsourced to a range of more specialised providers drawn from the GEI. The role of private sector consultants in 'statework' is not novel or unique to the Gulf region. As illustrated in Chapter 2, many scholars have documented and analysed their increasing role in policy work. However, analyses of the nature of their involvement and its consequences are based on examples that bear little resemblance to the contexts of the Gulf. In developed countries, as Ball (2007, 2009) argues, the neoliberal ideology promoting privatisation and the small state explains the increased proliferation of private sector consultants and policy entrepreneurs in policy work Ball. In contrast, in developing countries, the members of the GEI are often involved as part of aid packages wherein specific requirements are imposed on the recipient country by international organisations, which often necessitate the hiring of external experts (Bock 2014). The Gulf, however, presents a very different situation from both developed and developing countries. Traditionally, the role of management consultancies is to provide external legitimation for pre-conceived ideas within an organisation, rather than to provide their own original insights (Al-Ubaydli and Mirza, 2017). In contrast, the consulting services provided to the Gulf States are actively involved in running the policymaking as well as implementation, and sometimes also evaluation.

Finally, educational reforms were initiated at the top leadership level, and the lead consultants' entry into (and sometimes exit from) each of the Gulf States was ultimately dependent on its connections with and the support from the Monarchy (Saif, 2016). As the consultants' involvement was located outside the jurisdiction of the Ministries of Education, it effectively marginalised the latter and strengthened the role of the newly established semi-government agencies that were given greater autonomy and power over traditional ministries. As illustrated in my analysis, it was Qatari leadership that initiated the reforms and established the SEC to govern the reforms because the Ministry of Education was portrayed as rigid and resistant to change by RAND. In Bahrain, McKinsey was brought in by the Crown Prince and the EDB was presented as a 'facilitator of the reforms' whilst the MOE remained as a 'stakeholder'. Saudi Arabia's approach was more aggressive in that responsibility for the reform was removed from the MOE and handed over to a private holding company. This was officially justified by the need to increase the role of the private sector; however, it could also be explained as a manoeuvre:

> The ruling Al Saud have initiated controversial educational reforms by using peripheral institutions in order to bypass the clerical establishment. (Nolan, 2012, p. 8)

Scholars observing this governance pattern in the region argue that the establishment of parallel agencies was designed to overcome the rigidities of the traditional bureaucratic agencies (Abdel-Moneim, 2016, p. 33).Whilst such a strategy allows for 'bureaucratic manoeuvring', Nolan (2012, p. 99) argues that 'these efforts are largely bounded, and their ability to permeate through the rest of the system is limited'.

The first two features discussed above – the assumed causal relationship between education and economic performance and the consequent reliance on standardised data – reflect the standard logic applied by the GEI to analyse

educational systems globally (Auld and Morris, 2014; 2016) and the discussion in Chapter 4. However, the remaining three features – viz. the 'essentialised' model of policy borrowing, the centrality of the GEI's role, and the governance of reforms are distinctive to the Gulf States – serve in combination with the first two features, to locate education as a tool of economic policy and place its control firmly in the remit of the GEI and the newly established semi-government agencies. This has produced a distinctive model of policy borrowing in which the GEI has harnessed 'measuring and prescribing to the other' (Nóvoa, 2018; Nóvoa and Yariv-Mashal, 2003) to create a business model for 'selling to the other' reforms that represent the 'best global practices' of high performing nations.

The key question arising from analysis of this outcomes-driven movement is: is this approach effective? In the next chapter, based initially on the key performance indicators used from the outset by GEI actors, I explore the outcomes of the reforms analysed in this chapter. Subsequently I focus on Bahrain as a case for an in-depth analysis.

Chapter 7 **The Outcomes of Reform**

As noted above, despite the massive resources that were dedicated to educational reforms in the Gulf over the last few decades, the consensus around their impact indicates that the desired outcomes were not achieved:

> Despite the availability of ample financial resources and expert policy and management advice, most independent reviewers have concluded that the actual results have fallen short of initial expectations. (Alfadala, 2015, p. 4)

This view has been reiterated in academic studies (Al Essa, 2009; Alkhater, 2016; Kirk, 2014; Wiseman, Alromi and Alshumrani, 2014) assessing the implementation and outcomes of the reforms, as discussed in Chapter 2. The governments of the Gulf States also commissioned several evaluation studies from the GEI to assess the reforms' progress, understand the reasons for underperformance, and propose next steps. As a result, further reforms were announced in all six States. **Kuwait** has renewed its engagement with the World Bank to develop new reform initiatives. Following a commissioned review of previous reforms conducted by the World Bank, **Oman** launched a new education strategy titled 'The National Education strategy 2040'. **Qatar's** Education for a New Era has become a part of history; it was completely reversed and a new education strategic plan 2017-2022 has been put in motion. **Bahrain, Saudi Arabia** and the **UAE** continue to build on previous reforms, which appear to have slowed down and lost momentum.

This chapter focuses on what happened after the reforms, analysed in the previous chapter, were implemented and, in doing so, I address the third research question of this study: **What were the outcomes of the reforms and how were they perceived by key stakeholders?** I do not aim to undertake a comprehensive independent evaluation of the reforms; rather, I primarily draw on the GEI's own

reflections and evaluations of the reform outcomes which were largely defined with reference to improvements in pupil learning outcomes on ILSAs. The analysis then focuses on the perceptions of the stakeholders in relation to these outcomes. Stakeholders' perceptions in the case of Bahrain were collected through interviews. Since I did not interview stakeholders in the other countries, I relied mainly on analyses of news articles,[25] supplemented with evidence from the grey literature and academic studies of those countries.

The reforms that were introduced in the Gulf more than a decade ago, based on the GEI's advice, embody the principles of the so called 'Global Education Reform Movement' (GERM), which emphasises standardisation and educational accountability based on testing (Lingard and Lewis, 2016; Sahlberg, 2016). The Gulf countries placed great significance on 'measurable performance indicators' such as international and national assessments and global indices to measure the performance of their education systems and track their progress. Morgan (2017) argues that:

> instead of questioning the reliability and validity of global tests, these countries have opted to frame their educational quality goals in terms of their success on these assessments, leaving little room for a different problematisation of educational quality (Morgan, 2017, p. 287) .

The significance of this framing is illustrated in the integration of ILSAs results as 'key performance indicators' or 'measures of success' into national visions and strategic plans; and consequently, measurement of educational progress and analysis of policies according to these indicators. As I am focusing on the GEI's own reflections and evaluations, I use the GEI's terminology, such as 'outcomes',

[25] Although media are state controlled in the Gulf and thus described as the 'loyalist press', they are more likely to criticise government services that the general public finds deficient (Rugh, 2004, p. 65). In this respect, media articles provide a good reflection of the stakeholders' perceptions of the reforms in the Gulf States.

‘performance indicators’, ‘measures of success’ and ‘benchmarks’ in this chapter to analyse the enactment of the reforms.

The chapter is presented in two parts, The first looks at the outcomes in general by analysing the enactment of reforms in Kuwait, Oman, Qatar, Saudi Arabia and the UAE; this is done through an analysis of the main aims of the reform and the actual outcomes against the predefined performance indicators or measures of success; where possible this is followed by an analysis of the perceptions of the stakeholders of these outcomes. In the second part, I focus on Bahrain’s reforms and go beyond outcomes, performance indicators and measures of success to analyse government evaluation reports and explore what policymakers, policy implementers and consultants perceived and what their explanations were for these outcomes.

My analysis of the predefined KPIs and measures of success in all six countries reveals that these were of two types. The first were *‘deliverable indicators’* that were related to the implementation of the reforms in which success was measured by the establishment of new institutions and/or the delivery of the reforms’ main initiatives. An example of a *‘deliverable indicator’* would be:

> By the year 2018, the curriculum will be competence-based, national standards will be developed, teacher licensing will be implemented, school leadership will be improved, the school environment will be enhanced and assessment tools will be in place for objective and scientific evaluation. (MOE, 2013, p. 18)

The second type were *‘metric-based indicators’* which measured the performance of the education system against local and global metrics and indices. An example of *‘metric-based indicators’* would be:

> By June 2013, all Bahraini students will be at or above grade levels in mathematics, science, Arabic and English based on international standards.
>
> By June 2013, 75% of Bahraini schools will be rated at least ‘good’ by Bahrain’s Quality Assurance Authority, compared to 24% currently. In addition, 100% of Bahraini schools will be rated at least ‘satisfactory’,

> compared to just 64% currently. This means that by June 2013, Bahrain should have no 'inadequate' schools. (EDB, 2008a, p. 5)

And

> In 2030, we aim to have at least five Saudi Universities among the top 200 universities in international ranking. (CEDA, 2016, p. 36)

Whilst the Gulf States take part in many ILSAs - TIMSS, PISA and PIRLS - I focus in this chapter on the TIMSS results because all six states have participated in TIMSS since 2003 and the availability of these data will provide a better comparative perspective.

7.1 Outcomes of the Reforms in the Gulf States

Kuwait

At the end of Kuwait's 'Integrated Reform Program', the WB prepared a report assessing the achievements and challenges, termed 'Lessons Learned' (World Bank, 2014). In the absence of an official review document and public data on the performance of the Kuwaiti education system, the WB's report is used in this section as the main source of data for the analysis of the reform enactment in Kuwait. Consequently, the reform initiatives that were not implemented in partnership with the WB will not be included in this analysis, unless the data was available through other sources like news articles.

Aims and Indicators

The overall aim of the reform in Kuwait was to improve the quality of schools and education. The following were identified as the intended outcomes (World Bank, 2014, p. 11), and they are distinctively vague:

- Student achievement outcomes enhanced
- Internationally competitive students

- Evidence-based decision making for system improvement and accountability

The Kuwaiti MOE adopted in 2013 *'deliverable indicators'* where the completion of the Integrated Reform Programme's main initiatives (listed in Table 6-2 in the previous chapter) were described as 'measures of success'. The MOE stated that, by 2018, the curriculum would be competence-based, national standards would be developed, teacher licensing would be implemented, school leadership would be improved, the school environment would be enhanced, and assessment tools would be in place for objective and scientific evaluation (MOE, 2013, p. 18). In addition, the government's agenda report specified improving Kuwait's performance on TIMSS, PISA and the World Economic Forum's global competitiveness rank on the quality of education from 104 to 80 by 2017 (SCPD, 2013).

Enactment and Outcomes

The following reform initiatives, outlined as measures of success by the MOE (2013, p. 18), were implemented. The new competence-based curriculum was introduced in schools in in the academic year 2015/16 (SCPD, 2016); the curricula for 12 subjects in Grades 1-12 were revised accordingly by the MOE and the NCED, with the support of WB specialists; the national curriculum framework, and communication and teaching plans were also revised (World Bank, 2014, p. 5). In addition, the WB reviewed curriculum sector policies and architecture, textbooks and teaching materials, and delivered in-service teacher training (ibid, p.18).

A school leadership programme, targeting the improvement of policies, processes and practices, was piloted in 48 schools (ibid, p.19). The WB claimed the leadership programme 'transformed' the planning and decision-making practices to increase team-based and participatory approaches. The WB also reconceptualised leadership and administrative procedures, including new job descriptions to clarify

roles and responsibilities and training on decision-making, community engagement and planning (ibid, p.6).

The performance standards for teachers, school leaders and students were also developed by the WB in collaboration with the MOE and the NCED, some of which have been piloted in the 48 pilot schools (ibid, p. 20).

One of the main 'achievements' as described by the WB, was the establishment of the national assessment system housed in the NCED. The assessment was given the name MESA (stands for Maths, English, Science and Arabic) and it was implemented for three consecutive years for Grades 5, 9 and 12 (World Bank, 2014, p. 6).

However, not all of the initiatives of the reform in Kuwait were implemented. Especially those that were not part of the technical cooperation between Kuwait and the WB (World Bank, 2014, p. 11). In 2018, the government's review of their agenda's implementation indicated that only 45 percent of the teachers' licensing project was completed (SCPD, 2018, p. 48), and recently the MOE announced that it aims to complete the project by 2020 (Al Shemari, 2019). In addition, the Kuwaiti MOE focused on upgrading the schools' infrastructure and promoting ICT under the 'improving the quality of the learning environment' initiative. This was done by distributing more than 80,000 tablets in schools in 2015 (Farahat, 2016; KUNA, 2015) costing the Kuwaiti government more than 26 Million Kuwaiti Dinars (Al Hamadi, 2018); however the MOE eventually cancelled this project in 2018 (ibid).

Overall, despite adopting fairly non-specific measures of success, the reform's initiatives were only partially implemented when measured against the pre-defined *'deliverable indicators'* and the desired outcomes were not achieved. Kuwait's performance on TIMSS has been consistently low. Table 7-3 illustrates

how students performed better in 1995 compared to 2015 in TIMSS, and the majority of Kuwaiti students failed to meet the 'low' TIMSS benchmark (Figures 7-1 and 7-2). Similarly, the students' performance on PIRLS 2016 placed Kuwait 47th out of 50 (Mullis *et al.*, 2017). Kuwait's ranking on the education pillar of the world's competitiveness report shows that the 2017 target was not met, as Kuwait's rank remained at 104 (WEF, 2018, p. 109).

Despite this, the WB continues to describe the reforms in Kuwait as moving in the right direction where economic development is concerned:

> The educational reforms in Kuwait proceed according to a correct methodology. The modernisation of education contributes to Kuwait's economic development and helps bring about a better future for the country (KUNA, 2017)

The Education Practice Manager for the Middle East and North Africa at the World Bank Group further applauded the curriculum describing it as 'excellent and innovative' and as 'instigat(ing) creativity in school children and integrat(ing) them into school atmosphere' (ibid).

However, the new outcomes-based curriculum has been contested in Kuwait since its launch in schools; concerns were raised and predictions of its failure were discussed by local stakeholders, noting the lack of teacher training and the incompatibility of the new curriculum with the existing assessment system (Al Felikawi, 2018; Behbahani, 2016). More recently, the MOE, following pressure from parents resulting from the low performance of students in exams, reviewed the newly implemented curriculum (Ramadan, 2018) and subsequently announced that the curriculum would be withdrawn and replaced in the near future (Salim, 2018). Similar reviews of the leadership development programme highlighted the initial success but argued that 'principals faced obstacles related to the deeply-ingrained centralised structure in the MOE, whose mandates conflicted with the stated goal of

building principals' capacity' (Alsaleh, 2019, p. 96). The tablets project, as mentioned above, was cancelled following growing complaints from teachers and parents; the media reported that, although the project was theoretically beneficial, it required parents to absorb the cost in case the tablet was damaged, and the cost was higher than the tablet's market price. Furthermore, educators argued that the implementation was not designed well, teachers were not prepared, the curriculum did not support interactive learning and the infrastructure was lacking (Al Hamadi, 2018). Moreover, the NCED appears to be destined for abolition (Al Jassim, 2019), despite having been given the responsibility for implementing 5 of the 7 strategic projects under Kuwait's newly launched national vision (SCPD, 2018).

Thus, the initiatives that were implemented with the assistance of the WB were only successful in the early stages, and most were challenged once they were implemented and do not look to be sustainable.

Explaining the Underperformance

The World Bank attributed the under-achievement to what they have termed in their report as 'lessons learned', these were: frequent changes in administration, lack of clear management oversight structures and implementation arrangements, lack of communication amongst the key players and the lack of local talent and expertise (World Bank, 2014, pp. 22-25). These reasons appear to correlate with the challenges identified by the government in its periodic review of strategic projects' implementation, arguing that the lack of progress resulted from administrative and technical challenges (SCPD, 2018, pp. 70-72). In particular, financial challenges that caused the delay in approving the NCED's projects budget, and administrative challenges linked to the slow bureaucratic procedures for approving contracts, which subsequently delayed projects such as the teacher licensing and the introduction of

educational standards (SCPD, 2018, p. 47).

The reasons offered by both the WB and the Kuwaiti government for the lack of implementation, and underperformance, relate wholly to factors located within the local Kuwaiti context; there appears to be no critical evaluation of the reform itself or the work of the WB. In contrast, the local media, reflecting the perceptions of local key stakeholders, discussed extensively and questioned the capacity of the World Bank and its approach (Al Hamadi, Al Qaysar and Al Khalaf, 2017).

A former Minister of Education in Kuwait told a local newspaper that, while Minister, he had rejected the World Bank's reform proposal based on the belief that it was not suited for Kuwait's needs, but despite this, the decision was made that the WB's plan should be carried out. In the former Minister's view, the World Bank's work was a form of colonialism (ibid).

Interestingly, despite the failure to meet the aims and the negative perceptions of local stakeholders, the Kuwaiti government and the World Bank in 2015 announced another 5-year cooperation agreement focusing on educational reforms (World Bank, 2015b). The new wave of reforms aims to build on the earlier work and focus on:

> implementing reforms geared towards improving teaching and learning as well as monitoring the progress and impact of implementation on schools and students. It will also aim to strengthen the capacity of the Ministry of Education and the NCED in policy, decision-making and implementation of integrated reforms (ibid, para 2).

The importance of improving the quality of education was further reinforced under the newly launched 'Kuwait Vision 2035', where the KPIs for education focused on the quality of basic education, the education system and the teaching quality of Maths and Science (SCPD, n.d.-a). Whilst the vision document does not provide any details on how these indicators will be measured and tracked, the overall aim of

placing Kuwait in the top 35 percentile by 2035 on all indicators is stated upfront in the vision document (SCPD, n.d.-b). Eight strategic projects were proposed, focusing on developing a creative human capital through education reform aimed at better preparing youth to become competitive and productive members of the workforce. One of these projects was dedicated entirely to improving performance on international assessments, particularly TIMSS (ibid).

Oman

Oman was the first country in the region to launch systemic national-scale educational reforms in 1998. The reforms introduced initiatives designed to restructure the basic and post-basic education systems and introduce standards-based accountability measures, such as curriculum standards, national examinations and school inspections, to manage the performance of the education system. The overall strategy was instigated following advice from the WB and the Omani MOE partnered with a number of GEI providers to implement the different reform initiatives, as detailed in Table 6-3 in the previous Chapter.

Oman is now approaching the Vision 2020 expiry date and is preparing the new Vision 2040 (SCP, 2019a). Much of the planning for the new vision required evaluations of previous efforts, of which education was a key priority. Thus, based on the directives of the Sultan of Oman in October 2011, the Omani MOE was tasked to conduct a comprehensive evaluation of the educational reforms. The MOE commissioned two independent studies in cooperation with international experts: ‘Education in Oman: The Drive for Quality’ conducted in 2012 by the World Bank, and ‘Evaluation of the School System in Oman for K-12’ conducted the following year by the New Zealand Association for Research in Education (The Education

Council, 2016). In this section, I focus on the World Bank's report, mainly because the World Bank was a key advisor to Oman's government during the previous educational reforms, and because their report was made public whereas the second was not published.

Aims and Indicators

Educational reform in Oman was aimed at investing in human capital by equipping Omanis with the necessary skills to participate in the labour market and ultimately in achieving Economic Vision 2020:

> Development of human resources and Omanis' capabilities to keep up with technical development, manage the changes therein with high efficiency and face the ever-changing domestic and global conditions (SCP, n.d.-b, para. 2).

Whilst no clear measures of success were defined for Vision 2020, or made publicly available through the reform documentation, the quality of the education system in Oman continues to be measured against the performance on national and international tests (World Bank, 2012).

Enactment and Outcomes

Oman's main reform initiatives were implemented according to plan. The basic and post-basic education system redesign was completed and is being phased in, an outcomes-based curriculum has been introduced in all schools and a new assessment system was developed accordingly. Moreover, management and accountability systems were also established through school inspections to monitor the performance of the system. Whilst the reforms were successful in expanding access to education and reducing the dropout rates (MOE, 2004), the latter remained relatively high (Al-Ani, 2017), More importantly, the quality of the education system remained a source of concern. The World Bank's review acknowledges the implementation of these reforms:

> Recent endeavours to improve quality include the introduction of revised systems of basic education (grades 1–10) and post-basic education (grades 11–12). (World Bank, 2012, p. 23)

However, evidence from national and international assessments reveals that Omani students lag behind international standards and national expectations (Al Shabibi and Silvennoinen, 2018; Ridge, 2014). The World Bank's review report argues the same:

> recent national and international assessments of learning achievement highlight the need for a concerted effort to improve quality. (World Bank, 2012, p. 23)

It further urges the government in Oman to focus on the quality of education:

> The results of the analysis from this education sector study confirm that the key challenge facing the education sector in Oman is to improve the quality of student learning outcomes and that enhancing quality should be the Government's main priority in education. (ibid. p. 23)

Oman's results on TIMSS showed improvement over the last three cycles, however, as with the situation in the other Gulf States, it remained below the international benchmark (See Figures 7-1 and 7-2). The World Bank's analysis of these results emphasises the wide gap between girls and boys performance (see Figure 7-3). Moreover, teacher centred approaches and summative assessments were still favoured by Omani teachers (World Bank, 2012).

Explaining the Underperformance

Whilst the World's Bank review of the Omani education system acknowledges earlier reform efforts, which were instigated through its support (Donn and Al Manthri, 2013, p. 16), it also distances itself from the current issues:

> It should be noted that this study examines the outcomes of the general education system that has now been replaced by the basic education system, and the outcomes of this new system may be different. (World Bank, 2012, p. 227)

In its discussion of the findings, the World Bank attributed the low performance to several factors. These were: children starting school relatively late; the time on-task

is limited by the relatively short school year; boys make relatively little use of out-of-school time for educational purposes; curricula and examinations allow success through memorisation; and teachers are not prepared adequately and are complacent about current academic standards (ibid).

In contrast to the World Bank's review, which mirrors the official MOE narrative, Al Balushi and Griffiths (2013) argue that the implementation of reforms in Oman created numerous problems because the curriculum placed a stronger emphasis on English Language, Maths and Science, while reducing Islamic Studies and liberal arts, subjects which tends to serve the longer term goals of the society. They argue that teacher training conducted by outside agencies during the reforms was focused on specific one-off sessions using pre-packaged materials in an attempt to create mastery of new strategies. They also note that when initiatives were introduced and required sustained attention, the MOE disbanded them as soon as the contract with the external agencies ended, which meant that accumulated expertise was wasted, and teachers were unable to acquire new skills successfully.

Issan (2012) argues that communication with community members and institutions caused the reforms to collide with public opinion, and the approach to curriculum development was neither clear nor aligned with local needs. Similarly, Al Balushi and Griffiths (2013) note that teachers' input on reform initiatives was minimal and they were expected to enthusiastically implement them; but MOE failed to persuade teachers of the merits of the reforms. Donn and Al Manthri (2013) argue that, overall, the borrowed reform was inappropriate for the needs of Oman.

The World Bank's findings focused on the need to establish a culture of high standards and developing strong pedagogical skills, and argued that reaching the goal of improved education quality would require:

> all relevant ministries to unite their efforts and to plan together, for example through the development of a national strategy for education. Guiding the planning of the education sector could be the responsibility of a high-level body established with representation from the relevant ministries, including the MOE, the Ministry of Higher Education (MOHE), the Ministry of Manpower (MOM), the Ministry of Social Development (MOSD), the Ministry of Health (MOH) and the Ministry of Finance (MOF), and other stakeholders including the private sector. Within the MOE, a management training program could be established to enhance the leadership and planning skills of senior officials. (World Bank, 2012, p. 28)

Accordingly, in the same year, Oman's Education Council (EC), representing the entities suggested by the WB, was established by royal decree with a mandate of:

> Raising the standards of all forms, levels and outcomes of education in the Sultanate of Oman to improve its quality in a way that corresponds with the general policy of the State, development plans and the needs of the labor market … The function of the Council shall not be restricted to legislative aspects and setting educational policies of education, but it shall also follow up the performance of educational institutions and take appropriate decisions in this respect. (The Education Council, 2016, paras. 1-2)

Oman has adopted the WB's recommendations and launched the National Strategy of Education 2040 (The Education Council, 2018). The strategy is designed around four principles: adoption of a new framework for education, capacity building, delegation of responsibilities to educational institutions and adoption of an outcome-based approach (ibid, p. 27). These correspond to five sub-strategies that reflect to a large extent the recommendations of the World Bank's review. These were also incorporated in the preliminary Omani Vision 2040, emphasising a high quality education system; and, going forward the performance indicators focused on ranking on global indices (see Table 7-2).

Overall, the analysis of the reform's enactment in Oman reveals that, unlike Kuwait, the reform initiatives were implemented in accordance with the original plan. However, the goals of the reform were not achieved when measured against the

'metric-based deliverables', and despite this limited success, the Omani government continues to rely on the World Bank's advice.

Qatar

The Qatari 'Education for a New Era' reform was the most ambitious and largest in scale of all the Gulf reforms. Since its inception in 2004, it has drastically transformed the landscape of the education system. However, at the end of the first year of implementation, and following concerns raised by different stakeholders, the Supreme Education Council (SEC) commissioned RAND, the same think tank responsible for the design of the reforms, to assess the progress of the implementation (Zellman *et al.*, 2009). The findings, published by RAND in 2009, pointed towards progress but also highlighted a number of 'challenges'. The analysis which follows is based mainly on this report, supplemented by a number of academic studies and news articles that reflected on the success/ impact of the reform and the perceptions of the stakeholders.

Aims and Indicators

'Education for a New Era' was aimed at building a 'world-class' system that would meet the country's needs (Brewer *et al.*, 2007). Similarly, Qatar's National Vision 2030 (QNV) specified the aim of providing students with a 'first-rate education', comparable to that offered anywhere in the world' (GSDP, 2008, p. 13).

The reform document stated that the performance indicators would be 'process indicators' rather than measurable outcomes, justifying this decision by explaining that 'several years would be needed to experience and measure these effects' (Brewer *et al.*, 2007, p. 82). To that end, the success benchmarks would be *'deliverable indicators'* in the initial phases and would include the completion of the

key initiatives listed in Table 6-4 in Chapter 6. Ultimate success would however be judged on the basis of improvement in Qatari student outcomes (ibid), i.e. *'metric-based indicators'*.

Enactment and Outcomes

By 2011 all Qatari MOE schools were converted into independent schools that are privately run but publicly funded, operating alongside private schools. Internationally benchmarked curriculum standards and the core components of the accountability system, such as national tests and school report cards, were also put in place. Furthermore, school teachers and leaders were provided with more professional development opportunities (Zellman *et al.*, 2009). In 2012, the SEC began the move towards the third governance option, that of the voucher system (See Figure 6-3 in Chapter 6). The reforms appear to have been implemented in accordance with the initial design, yet according to Alkhater (2016), a decade after the launch, 'Education for a new Era' appears to have been abandoned and consigned to history in Qatar.

The two major changes that the reforms in Qatar hinged on: the structural changes to the governance of the education system, achieved through the establishment of the SEC; and introducing the independent schools model, have been abrogated (Alkhater, 2016). During the initial years of implementation, a number of RAND's recommended policy changes were reversed, most notably the decision to change the medium of instruction to English. Ultimately, the SEC was officially disbanded in 2016 (Walker, 2016) shifting its responsibilities back to the Ministry of Education and Higher Education and whilst schools retained the 'Independent

School' name, mainly to project an image of continued success, their operating model is now more centralised (Alkhater, 2016).

Student outcomes fell well short of expectations, although performance in TIMSS and PISA has shown marginal improvements, Qatari students continue to perform below international benchmarks and the most recent TIMSS results show that more than half of the Qatari students performed at or below the 'Low' TIMSS benchmark (Martin *et al.*, 2016; Mullis *et al.*, 2016), as illustrated in Figures 7-1 and 7-2. Furthermore, national tests results are reported to show poor outcomes, and they have been put on hold while models from Japan, Korea and the Netherlands are considered as alternatives to the US and the UK ones used previously (Paschyn, 2013).

Explaining the Underperformance

RAND was invited in 2005 by the SEC to monitor, evaluate and report on the development and quality of the independent schools. This assessment happened in the early days of implementation and at a time when not all schools in Qatar had yet been converted into independent schools. The review, which was conducted over a period of two years, highlighted that the reform was working in its early years, yet more progress was needed (Zellman *et al.*, 2009). The report recognised that independent schools differed markedly from the MOE schools in terms of teacher recruitment and professional development, their approach was more student-centred, parents demonstrated higher level of satisfaction with independent schools and their students outperformed their ministry peers. The report argues that implementation issues were caused by frequent policy changes that negatively affected the reform effort and created uncertainty and concern among stakeholders; limiting the potential

of the reform's future power (ibid). RAND's analysis of progress and the reasons given for the implementation issues, echoes the language and the reasons cited in the WB's analyses in Kuwait and Oman, and locates the reasons for underperformance wholly in the local context.

However, a review of the academic and media coverage reveals that 'social controversies' contributed to the reform's difficult implementation and disappointing outcomes. Alkhater (2016) argues that 'the frequent policy changes' stemmed from the underestimated or understudied interdependence between policy design and implementation, and a failure from the outset in accounting for the local context and behaviour of stakeholders. For example, 'the hiring and firing of teachers and merit pay', a feature of the independent school model that allows greater autonomy in hiring and firing teachers, was put aside by RAND for consideration at the design phase, calling them no more than 'operational details', later proved to be fundamental to the reform's model (ibid, p.104). Teachers in Qatar, like their peers in the other Gulf States, are civil servants subject to the civil service laws that allow very limited flexibility in hiring and firing at the school level. Therefore, when independent school operators were forced to deal with the legacy of the former system, they were unable to solve the problem of the 'unqualified' teachers they inherited. This issue was resolved, through a workaround, by transferring hundreds of Qatari teachers to administrative roles, or offering them early retirement options. However, eventually many of these teachers were integrated back into the system, many as teachers (ibid, p.105). This 'workaround' is typical of the solutions offered by consultants working in the region and this is also illustrated in their recommendations to circumvent the traditional organisations by proposing new parallel semi-government entities like the SEC.

Another example discussed widely in the local media in Qatar was the ‘unsuccessful’ SEC decision to teach Science and Maths in English, which was based on RAND’s recommendations. This was reversed in 2012 (Khatri, 2013); the SEC’s decision resulted in demands from parents and students who feared that the Arabic language was being marginalised and threatened their identity (Al Khathar, 2012); it also caused very low performance on both subjects (Paschyn, 2013). The reversal of the RAND reform in Qatar was welcomed as the right move in local media (AlHajjawi, 2016).

Since then, Qatar has launched Two Education and Training Sector Strategies, the first covering the period 2011-2016 and the second 2018-2022. Both strategies were aligned with the National Development Strategies and Qatar Vision 2030. The second strategy set out national directions for the education system and the corresponding measures of success. It aims at creating a global education system that offers equitable opportunities for access to quality education and training, providing the necessary competencies to contribute to development and promoting the values of Qatari society with a call for tolerance and respect for other cultures (MoEHE, 2019). The strategy is based on five main programmes and identifies a number of key performance indicators including performance on national and international tests. These are detailed in Table 7-2.

As with the reforms in the other Gulf States, the reforms in Qatar appeared to be successful in its early stages, and Qatari students’ performance on ILSAs did improve. However, the entire reform was aborted and the governance structure was reversed in Qatar due to its incompatibility with aspects of the local context that were not considered by the GEI until they sought to explain the low levels of implementation. Despite the concerns amongst the local stakeholders regarding

international partnerships, cooperation with GEI continues in Qatar, albeit not at the same level as in the previous reforms. International university campuses continue to operate in Qatar Education City and the several GEI actors continue to operate schools.

Saudi Arabia

It has been 10 years since the announcement of the King Abdullah Bin Abdul Aziz General Education Development Project and the establishment of 'Tatweer', and more than 6 years since the establishment of the subsidiary organisation Tatweer for Educational Services (T4edu). No official reviews were commissioned or have been made public, yet educational reform in Saudi Arabia remains widely debated in academic and media articles.

Aims and Indicators

The overall aim was to invest in Saudi youth and prepare them for the labour market. The strategic education plan published in 2013 included a list of 10 key performance indicators, which included 61 sub indicators (Tatweer, 2013). These included *'deliverable indicators'* and *'metric-based indicators'*, for example: implementing the different reform initiatives; improvement of student performance in core subjects; improvement of Saudi Arabia's ranking on TIMSS and PIRLS; increasing enrolment rates especially in ECE; decreasing dropout rates, and improving student aptitude and behaviours over a 5-year period (ibid).

Enactment and Outcomes

Tatweer has implemented a number of initiatives under each main reform axis. Teachers' professional development programmes, designed and delivered by Pearson, started in 2014 and was aimed at improving the teaching of Science, Maths

and English (Trade Arabia, 2014a; Trade Arabia, 2014b). A proposal for the establishment of a dedicated National Centre for Teachers' Professional Development was prepared by T4Edu (Tatweer, n.d.-e). In addition, T4Edu has been delivering a number of other professional development programmes for teachers in other areas and for school leaders (T4Edu, 2019b).

T4Edu has also launched 3 programmes under the curriculum axis: one aimed at improving early childhood education, one at improving the ICT curriculum, and the third, in collaboration with the MoE, designed to improve the teaching of English (Mitchell and Alfuraih, 2017) being procured from UK publishers including Macmillan, McGraw Hill, Oxford and Pearson (Barnawi and Al-Hawsawi, 2017). Moreover, T4Edu has launched a programme that aims to improve the ICT curriculum (Tatweer, n.d.-b).

T4Edu has also implemented programmes to improve schools and private education. It completed the restructuring and merger of the Ministry of Education and the Ministry of Higher Education with BCG in 2015, and launched several other programs to promote ICT in education, including an online educational portal and increasing e-educational content (Tatweer, n.d.-c).

Whilst it is too early to judge the outcome of reforms in Saudi Arabia, measuring progress on international tests so far demonstrates a downward trajectory. The investments in education are yet to produce the desired outcomes. Performance on TIMSS has indicated a decline over time (see Table 7-3): more than 89 percent of Grade 8 students performed at or below the 'low' international benchmark and maths and 78 percent in science (see Figures 7-1 and 7-2 below).

The results of the latest PIRLS assessment shows that the country is still performing well below the international benchmark (average):

> Results from the latest 2016 Progress in International Reading Literacy Study (PIRLS) released last week showed that fourth-graders in Saudi Arabia were reading at a level well below the international average. The Kingdom scored 430 –significantly lower than the PIRLS Scale Centre point score, 500 – placing it 44th out of 50 (Pennington, 2017, para. 7)

Explaining the Underperformance

The Saudi MOE and Tatweer have not published any evaluation studies, but instead, scholars and stakeholders have discussed the educational reforms and painted a picture of dissatisfaction.

In his book, Ahmed Al Essa, the former Saudi Minister of Education[26], reviews educational reforms in Saudi Arabia and argues that despite the high levels of spending on education, the outcomes are generally disappointing, noting that this is a result of a problem at the diagnostic phase which failed to address the root causes (Al Essa, 2009, pp. 57-59). Al Essa argues that Tatweer, which came as a surprise to educators when it was announced, was initially welcomed and celebrated, but, that enthusiasm soon diminished given the long 3-year period of inaction that followed its announcement (ibid. p.66). This prompted the Saudi Shura Council to seek clarifications from Tatweer and the MOE. The response from them attributed the delay to budget approval, bureaucratic procedures, lack of flexibility, lack of local talent and difficulty in attracting qualified experts because the remuneration plan was rigid and outdated (‘Riyadh’ and ‘Al Watan’ newspapers cited in Al Essa, 2009)

Al Essa argues that in addition to the views discussed in the media, there are three fundamental factors that contributed to the recurring failures of reforms in Saudi Arabia: the absence of a clear vision, policy and political will; the religious

[26] Al Essa published the book, which was banned in Saudi Arabia for a while, before his appointment as a Minister of Education in 2015 until 2018.

culture's apprehension of the reforms and the inability of the administration to change (ibid)

Tayan (2017) argues that the Tatweer reforms were based on neoliberal thought and questioned whether these were rigorous and effective for improving the quality of the education system in the religiously conservative Saudi context.

With the launch of the national vision in 2016, the commitment to educational reform was renewed, and Tatweer and its subsidiaries appear to be moving ahead alongside the Ministry of Education and Higher Education and the evaluation and quality assurance entity in designing and implementing future initiatives. As the country prepares to take part in PISA 2019, more GEI agreements have been signed:

> Dr Al Essa said the ministry signed an agreement with the OECD just last month to 'to explore opportunities to further deepen cooperation on the design and implementation of education reform in Saudi Arabia.' The ministry is also working with the National Association for the Education of Young Children in the United States to acquire additional expertise in early childhood development, curriculum design and setting new standards. (Pennington, 2017, para. 9)

Interestingly, the quote above shows that Al Essa has abandoned his earlier perceptions which he published before becoming the Minister of Education. This illustrates that the cooperation with the GEI transcends the Ministry and aligns with higher level decisions.

Going forward, the aim of 'Learning for Work', and education for economic growth, measured by the performance on national and international indicators, has been introduced in the national vision which was launched in 2016. The vision document specifies that:

> We will continue investing in education and training so that our young men and women are equipped for the jobs of the future. We want Saudi children, wherever they live, to enjoy higher quality, multi-faceted education. We will invest particularly in developing early childhood education, refining our

> national curriculum and training our teachers and educational leaders. We will also redouble efforts to ensure that the outcomes of our education system are in line with market needs (CEDA, 2016, p. 36)…
>
> We will close the gap between the outputs of higher education and the requirements of the job market. We will also help our students make careful career decisions, while at the same time training them and facilitating their transition between different educational pathways (ibid, p.40)…
>
> In the year 2030, we aim to have at least five Saudi universities among the top 200 universities in international rankings. We shall help our students achieve results above international averages in global education indicators (ibid, p.40)

Although the MOE has not published an updated strategic plan, the *National Transformation Document* and the Vision's official website list numerous education projects and related targets (see Table 7-2 below).

United Arab Emirates

Aims and Indicators

Abu Dhabi's Department for Education and knowledge (ADEK)'s aim for introducing the reforms that started in 2006 was to elevate the quality of schools to international standards (Pierson, 2011). ADEK's P-12 strategy specifies a *'metric-based indicator'*: students will be performing above the international average, know their history and culture and have access to quality schools (ADEK, n.d.-c). Each of the 4 priorities outlined in the ADEK's strategic plan was supplemented with additional *'metric-based targets'*, ranging from performance on international and national tests to percentages and enrolment rates (Badri and Khaili, 2014). ADEK also introduced two national assessment tools, the External Measure of Student Achievement (EMSA) and the Performance Indicators in Primary Schools (PIPS) to monitor the performance of the education system (ADEK, n.d.-b).

Similar measurable targets were specified in Abu Dhabi's vision 2030 (The Government of Abu Dhabi, 2008, pp. 123-125). The vision's website has a dedicated *'metric-based'* 'KPIs' page that shows an updated percentage for student enrolment rates in higher education and the percentages of students completing vocational and technical education (Our Abu Dhabi, 2017). These targets and measurable performance indicators are further reinforced in the UAE's Vision 2021:

> The National Agenda has set as a target that our students rank among the best in the world in reading, mathematics and science exams, and to have a strong knowledge of the Arabic language. Moreover, the Agenda will aim to elevate the rate of graduation from secondary schools to international standards and for all schools to have exceptional leadership and internationally accredited teaching staff. (UAE PMO, 2018a, para. 2)

These are translated into 13 *'metric-based indicators'*, which include TIMSS, PISA and national test scores, enrolment rates, percentage of schools with highly effective leadership and quality teachers and upper secondary graduation rates (ibid).

Enactment and Outcomes

It has been a decade since the New Schools Model was announced in Abu Dhabi. Schools began implementation in the academic year 2010/11 and the New Schools Model was phased in over a 6 years period (ADEK, 2012, p. 14). The model standardised curriculum, pedagogy, resources and support across all schools in an effort to promote a child-centred approach (ibid).

As described in Chapter 6, numerous international agencies were hired to assist ADEK in designing and delivering professional development programmes for teachers and a large number of English Medium Teachers (EMTs) were hired to teach Maths, Science and English, mainly from USA, Canada, United Kingdom, Australia and New Zealand (Dickson, 2012). Meanwhile, the new outcomes-based

curriculum, developed in cooperation with the New South Wales Government (Australia) was introduced.

Overall, the New Schools Model appeared to be implemented according to the original plan, with support from ADEK and AD's government. However, in 2013, ADEK reported that 'the performance of school graduates was still unsatisfactory, with 35 percent unqualified for university and more than 87 percent requiring bridge programmes' (Oxford Business Group, 2019, para. 34), albeit emphasising that the model's purported benefits may not be fully measured until complete implementation was achieved across all levels of the K-12 segment, that is by the 2019/20 school year (ibid). Notwithstanding ADEK's comments, UAE students continue to underperform on international tests, with performance on PISA declining and the benchmark sample of AD students failing to show improvements on TIMSS (see Table 7-4). Concerns are now growing as the deadline for the UAE Vision 2021 target is approaching whilst students are still lagging behind international benchmarks (Zaman, 2018).

Explaining the Underperformance

Abu Dhabi's school reforms generated similar social controversies to those in Qatar, mainly as a result of the similarity in approach, speed of implementation and lack of consultation with school staff who perceived the reforms as the 'westernisation' of the education system (Dickson, 2012). Soon after the implementation of the new model, voices of concern were raised amongst parents and teachers, largely around the suitability of the reform for the local culture; local educators labelled the use of native English teachers an 'external intervention that will erode the cultural and national identity of students' (Ahmed, 2010, para.1). Local stakeholders have also voiced concerns around the speed of changes and the lack of communication and

consultation with them from ADEK (Salem, 2010). ADEK appeared to be aware of the parents' concerns:

> A survey of parents of children attending public schools conducted in April 2012, about 82% of the surveyed parents wanted their children to be taught mathematics and science in Arabic. However, 91% of parents of children in private schools preferred mathematics and science to be taught in English (Badri and Khaili, 2014, p. 208).

In response, ADEK referenced international examples supporting teaching in English and insisted this served the purpose of preparing school leavers for higher education and the labour market (ibid). Belhiah and Elhami (2015) argue that the issue of the language of instruction in the UAE has caused controversies and was perceived to be a threat to the national identity. Despite this, ADEK continues to implement its strategy and the NSM reform, and there appears to be no new reform on the horizon. As in the other Gulf States, the work with the GEI continues as well.

Summary

The summary of the reforms outcomes in the Gulf States, as measured against the predefined *'deliverable indicators'* and the *'metric-base indicators'* reveals that the goals of the reforms were not achieved , and consequently the approach designed and delivered by the GEI was of limited effectiveness. Table 7-1 below summarises this analysis. The overall reform aims were not achieved and the students continue to perform below international benchmarks. Tables 7-3, 7-4, 7-5 and Figures 7-1, 7-2 and 7-3 further illustrate these points.

The reforms appear to be successful only at the initial stages; however, once the implementation phase begins, they appear to be challenged. GEI members and the Gulf governments attribute the difficulties to factors that are located within the local context, whilst local stakeholders are more critical of the GEI's approach and

its unsuitability for the local context. Moreover, despite the limited success, the Gulf States continue to rely on the GEI to assess the previous reforms and design future ones.

Country	Reform's main aims	KPIs and Measures of Success	Outcomes	Perceptions
Kuwait	Improve the quality of schools and education in Kuwait	**Deliverable indicators:** • By 2018, the reform programme's initiatives will be implemented. **Metric-based indicators:** • Improve performance on TIMSS and PIRLS • Improve Global Competitiveness rank on quality of education indicator to 80 by 2017.	• Only 4 initiatives were implemented, but later cancelled or put on hold • Kuwait's scores on TIMSS and PIRLS show a decline • Kuwait's rank in the quality of education did not improve	• WB/ Kuwaiti government attributed the failure in meeting the aims to administrative and technical challenges • Local stakeholders questioned the suitability and effectiveness of the World Bank's approach for Kuwait.
Oman	Investing in human capital to equip Omanis with necessary skills to participate in the labour market and achieve economic vision 2020	**Metric-based indicators:** • Improve students' performance on national and international tests	• Basic and Post-Basic education were restructured • New curriculum and assessment introduced • System management practices were introduced • Omani students' performance improved on TIMSS and PIRLS but still below international benchmarks	• WB/ MOE report perceived challenges resulting from a disconnect between perceptions of learning outcomes and actual learning outcomes (low standards) and lack of teaching quality • Local Stakeholder: strong emphasis on English language and STEM over subjects that serve the longer term goals of the society, inadequate teacher training, lack of teacher involvement in planning and lack of communication.
Qatar	Building a 'world-class' system that would meet the country's needs (Brewer *et al*, 2007), and providing students with a 'first-rate education', comparable to that offered anywhere in the world (GSDP, 2008, p. 13).	**Deliverable indicators:** • The completion of the key initiatives such as the curriculum standards, national assessments and the new schools model **Metric-based indicators:** • Improvement in Qatari student outcomes	• Key initiatives were introduced, however later abolished and reverted to pre-reform status • Qatari students' performance improved on TIMSS and PISA, but still below international benchmarks	• RAND/ SEC: reform was working in its early years but implementation issues were caused by frequent policy changes that negatively affected the reform effort and created uncertainty and concern among stakeholders • Local stakeholder: Social controversies, RAND's failure in accounting for the local context during the design phase

KSA	Develop a high-quality education system that enables students to reach their full potential, develop a comprehensive personality, participate effectively in their society, and loyal to the nation and religion	**Metric-based indicators** • The strategic education plan published in 2013 included a list of 10 key performance indicators, and 61 sub indicators	• Tatweer has implemented a number of initiatives under each of the main reform axes. • Completed the restructuring and merger of the Ministry of Education and the Ministry of Higher Education • Performance on TIMSS and PIRLS declined	• MOE/ Tatweer: Initial delays were attributed to budget approval, bureaucratic procedures, lack of flexibility, lack of local talent and difficulty in attracting qualified experts because the remuneration plan was rigid and outdated • Local stakeholders: absence of a clear vision, policy and political will, religious culture doubting the reforms and the inability of the administration to change. Suitability of neoliberal reforms to the Saudi conservative context
UAE	Elevate quality of schools in Abu Dhabi to international standards	**Metric-based indicators** • Performance above international average, know their history and culture and have access to quality schools • Each of the 4 priorities outlined in the P-21 strategic plan was supplemented with 'targets', ranging from performance on international and national tests to percentages and enrolment rates (Badri and Khaili, 2014) • TIMSS, PISA and national test scores	• Implementation of the NSM started in 2010/11 • Performance on international tests shows marginal improvements	• Local stakeholder: speed of implementation and lack of consultation with school staff who the perceived the reforms as the 'westernisation' of the education system. The reform was incompatible with the local culture

Table 7-1 Aims, KPIs, outcomes and perceptions of Gulf reforms

Country	Future educational reforms	Future KPIs
Kuwait	Kuwait's Vision 2035 dedicated 6 strategic project to improve basic education under the 'creative human capital' pillar: 1. The Integrated Education Reform Program project 2. Discovering and nurturing project of gifted students (Scientists of the future) 3. The national learning standards project 4. The national and international studies project to measure and evaluate Kuwait's education system (MESA, TIMSS and PIRLS) 5. The national university enrolment placement tests project 6. The teachers' license project 7. The school excellence project for applying comprehensive quality standards in school management	• Vision 2035: Kuwait in the top 35th percentile by 2035 on all indicators ○ Quality of basic education ○ Quality of education system ○ Teaching quality of mathematics and science
Oman	Oman's preliminary Vision 2040 document dedicated the first national priority to 'education, learning, scientific research and national talents, under which 7 goals were identified (and correspond to the National Education Strategy 2040): 1. A high-quality educational system with communal partnerships 2. An integrated and independent system for the governance and evaluation of the educational system in accordance with national and international standards 3. Value-reinforcing curricula; mindful of the principles of Islam and the Omani identity, drawing inspiration from the history and heritage of Oman, keeping abreast of the requirements of sustainable development and future skillsets, and supporting diversification of educational tracks 4. A system that empowers human capabilities in the educational sector	• By 2040, Oman will: ○ rank amongst the top 10 countries in the Skills Global Competitiveness Index ○ rank amongst the top 20 countries in the Global Innovation Index ○ rank amongst the top 20 in the Global Talent Competitiveness index ○ rank amongst the top 10 countries in the Education for All Development Index ○ The average rank of the Omani universities listed on the Quacquarelli Symonds Ranking of World universities will be 300

	5. An effective national system for scientific research, creativity and innovation that contributes to building a knowledge-based economy and society 6. Diversified and sustainable sources of funding for education and scientific research 7. National talents with dynamic and competitive capabilities and skills, both nationally and globally	○ 4 Omani universities will be listed on the top 500 Quacquarelli Symonds Ranking of World Universities ○ Number of Graduates from Programs or Institutions for Gifted Students (at all education levels) out of Identified Gifted Students ○ The Global Human Capital Index
Qatar	1. Raising the quality of early education in kindergartens and public schools 2. Developing Qatar's national educational curricula, 3. Establishing a comprehensive quality management system for teachers and leaders of public and private schools, 4. Improving the institutional performance of the Ministry of Education and Higher Education 5. Raising the quality of services provided to stakeholders	• By 2022: ○ More than 80% of Qatari grade 3 students in government schools will achieve 70% or more in Arabic, English and Math national examinations ○ More than 80% of Qatari grade 6 students in government schools will achieve 70% or more in Arabic, English, Math and Science in national examinations ○ Qatari students will perform at international average (score 500) in TIMSS and PIRLS ○ 90% of primary, core subjects, Qatari teachers will be licensed ○ 50% of Qatari school leaders will be licensed.
Saudi Arabia	Saudi's Vision 2030 specifies the following priorities for education: 1. Invest particularly in developing early childhood education 2. Develop a modern curriculum focused on rigorous standards in literacy, numeracy, skills and character development 3. Track students' progress and publish a sophisticated range of education outcomes, showing year-on-year improvements 4. Improve teachers and educational leaders training 5. work towards developing the job specifications of every education field	• By 2030: ○ Close the gap between the outputs of higher education and the requirements of the job market. ○ Have at least five Saudi universities among the top 200 universities in international rankings. ○ Students will achieve results above international averages in global education indicators.

	6. Work closely with the private sector to ensure higher education outcomes are in line with the requirements of the job market 7. Establish sector councils that will precisely determine the skills and knowledge required by each socio-economic sector. 8. Expand vocational training in order to drive forward economic development. 9. Steer scholarship opportunities towards prestigious international universities and be awarded in the fields that serve our national priorities. 10. build a centralized student database tracking students from early childhood through to K-12 and beyond into tertiary education (higher and vocational) in order to improve education planning, monitoring, evaluation, and outcomes	

AD	Continue implementing ADEK's strategic plan and the New Schools Model	• Abu Dhabi Vision 2030 specifies the measures of success related to education around improving educational attainment, including:
		  ○ Percentage of students capable of enrolling in higher education institutions without undergoing a foundation year
		  ○ Percentage of students completing the vocation and technical education
		• UAE's vision specifies that by 2021, students will rank among the best in the world on the following Indicators:
		  ○ TIMSS, PIRLS and PISA results
		  ○ Enrolment rates in foundation year and preschools
		  ○ Percentage of schools with highly effective leadership and high quality teachers
		  ○ Percentage of students with High skills in Arabic according to national skills
		  ○ Upper secondary graduation rates

Table 7-2 Aims and KPIs of future reforms in the Gulf

Year	1995				2003				2007				2011				2015			
Subject	Math		Science		Math		Science		Math		Science		Math		Science		Math		Science	
Grade	4	8	4	8	4	8	4	8	4	8	4	8	4	8	4	8	4	8	4	8
Bahrain						401		438		398		467	436	409	449	452	451	454	459	466
Kuwait		392		430					316	354	348	418	342		347		353	392	337	411
Oman										372		423	385	366	377	420	425	403	431	455
Qatar									296	307	294	319	413	410	394	419	439	437	436	457
KSA						332		398		329		403	410	394	429	436	383	368	390	396
UAE													434	456	428	465	452	465	451	477
International Benchmark[27]					**495**	**467**	**489**	**474**	**500**	**500**	**500**	**500**	**500**	**500**	**500**	**500**	**500**	**500**	**500**	**500**
Dubai									444	461	460	489			461	485	511	512	518	525
Abu Dhabi															411	461	419	442	415	

Table 7-3 Overall TIMSS results for all Gulf States since 1995[28]

[27] The TIMSS achievement scale was established in 1995 based on the combined achievement distribution of all countries that participated in TIMSS 1995. To provide a point of reference for country comparisons, the scale centerpoint of 500 was located at the mean of the combined achievement distribution. This scale centerpoint of 500 has replaced the international average and is referred to as the international benchmark.

[28] None of the Gulf States participated in TIMSS 1999.

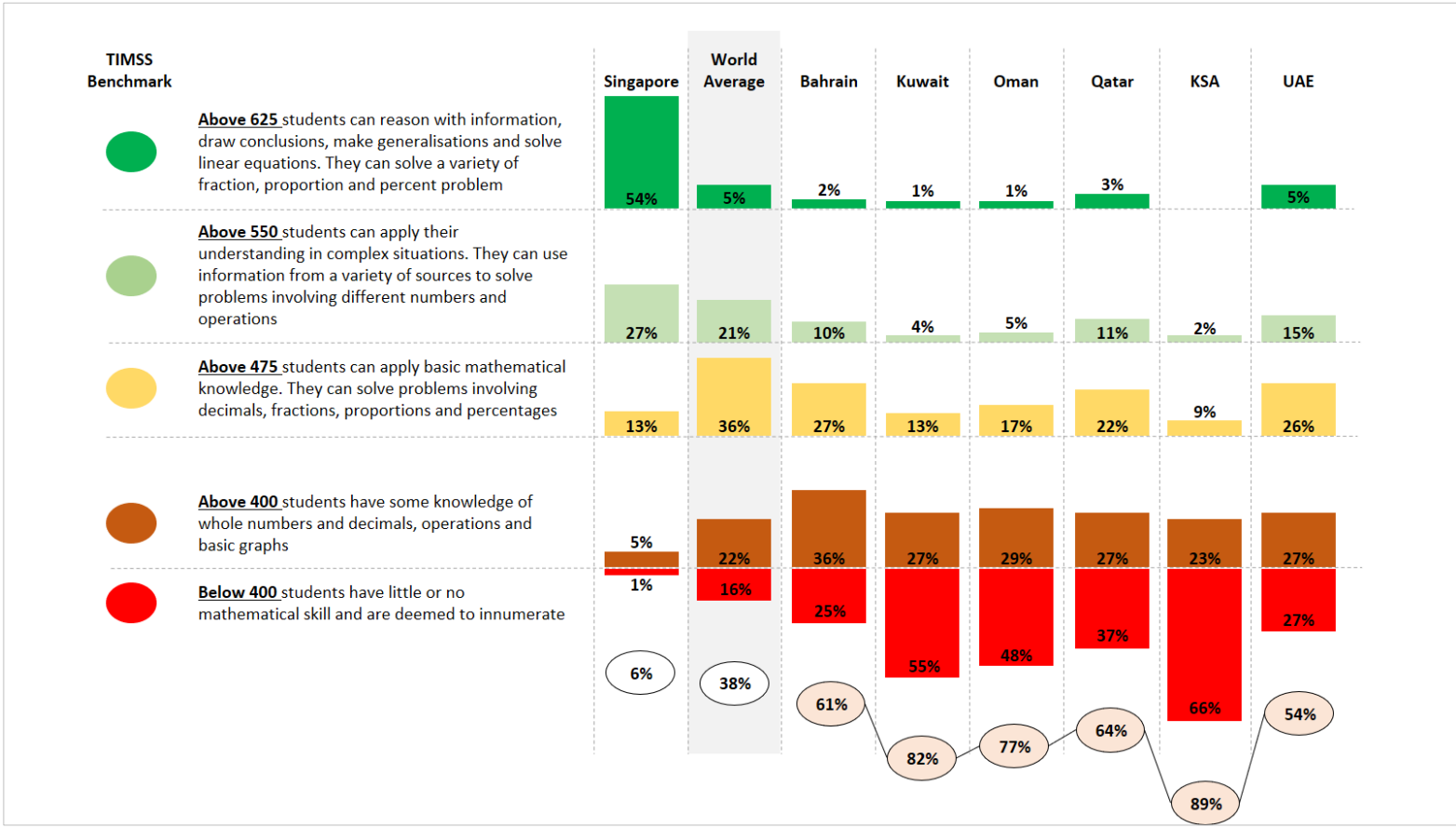


Figure 7-1 TIMSS Maths 2015: The performance of Grade 8 Gulf States' students in relation to TIMSS benchmarks

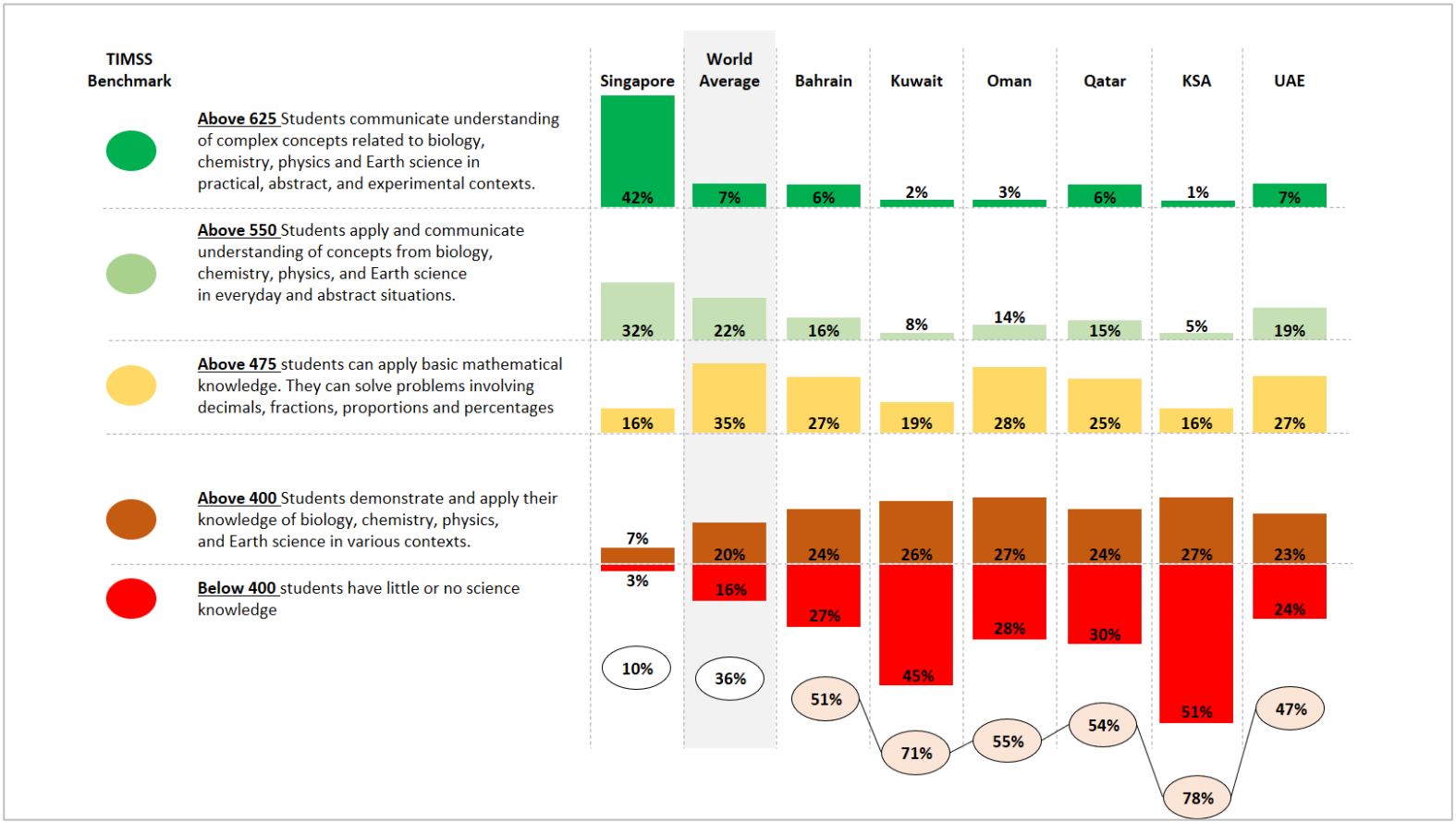


Figure 7-2 TIMSS Science 2015: The performance of Grade 8 Gulf States' students in relation to TIMSS benchmarks

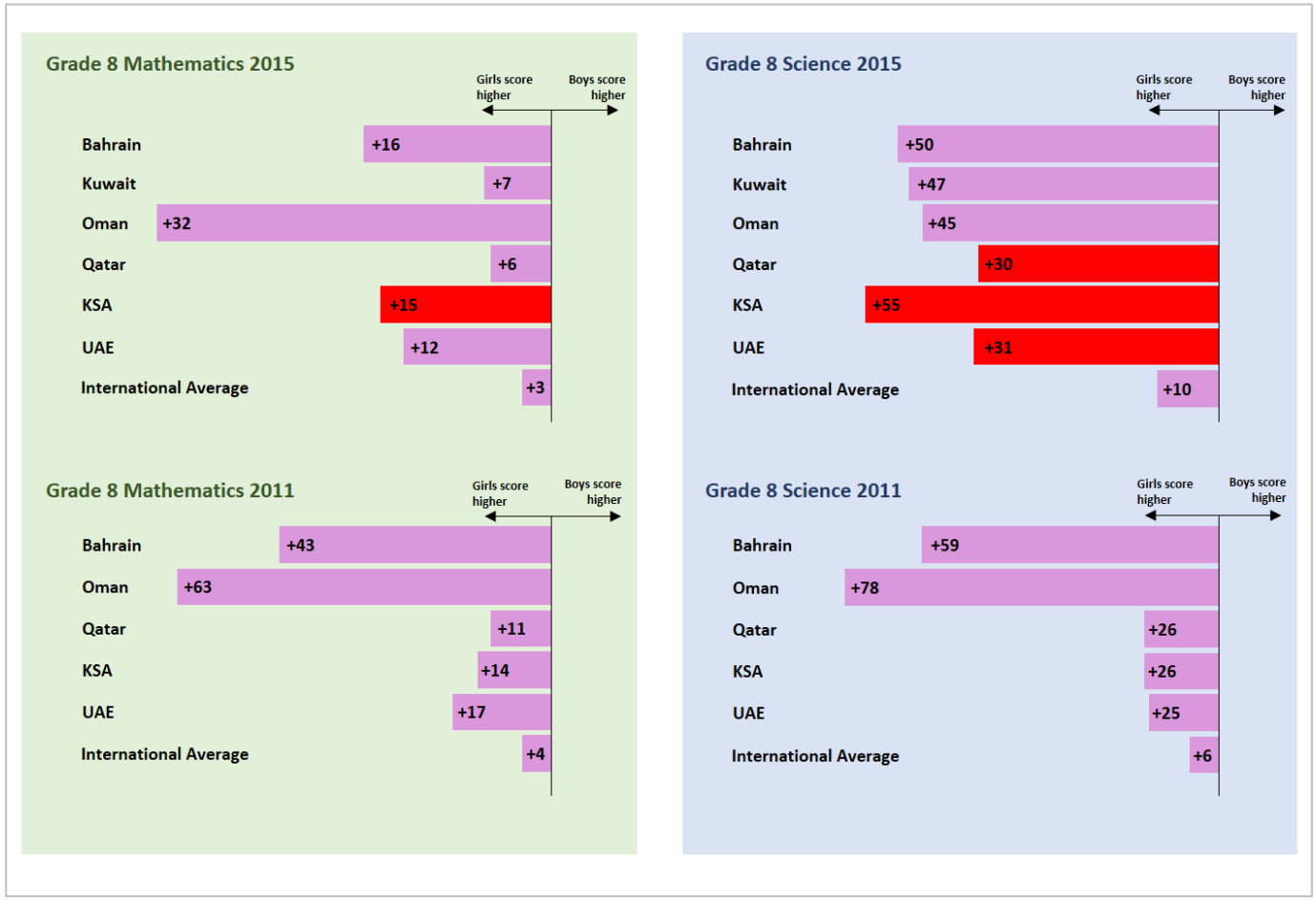


Figure 7-3 Grade 8 performance by gender on TIMSS 2015-2011

Year	2006			2009			2012			2015		
Grade	Science	Maths	Reading	Science	Maths	Reading	Science	Maths	Reading	Science	Maths	Reading
Qatar	349	318	312	379	368	372	384	376	388	418	405	402
UAE	-	-	-	466	453	459	448	434	442	437	427	434

Table 7-4 PISA results

Year	2011	2016
Bahrain	-	446
Kuwait	419	393
Oman	319	418
Qatar	425	442
KSA	430	430
UAE	439	450

Table 7-5 PIRLS results

7.2 Outcomes of Bahrain's reform

At the time of writing this chapter, the institutions that were established as part of the education reform project in Bahrain were celebrating their 10th anniversary. However, these celebrations only reflected reaching a symbolic milestone of being in operation. Over the last 5 years, the Supreme Council for Education and Training (SCET), formerly the Education Reform Board (ERB), commissioned several studies to assess the progress of the reform programme, based on concerns that it is not being implemented as planned and the desired outcomes have not been achieved. The former Executive Director of Education Reform in the PMO conducted the most comprehensive evaluation in 2015, which was commissioned based on the concern that the reforms had lost momentum and that the implementation that had made promising steps in the earlier days was now at a standstill (Forrest, 2016a, p. 4).

In this section, I use the case of Bahrain for an in-depth analysis of the enactment of the reforms, using the SCET review report and interviews with Bahraini policymakers, policy implementers as well as GEI consultants as the main sources.

Bahrain's reforms, analysed in the previous chapter, consisted of two waves: the first was introduced in 2005 to deliver the highest impact initiatives and lay the foundations for the second wave, which was introduced in 2008. Table 7-6 below lists the key initiatives and their progress:

Wave	Main initiatives	Progress
Wave one (2005-2008)	• Bahrain Quality Assurance Authority • Bahrain Polytechnic • Bahrain Teachers College • Secondary Vocational Education Program	• Established and still in operation • Established and still in operation • Established and still in operation • Introduced but lost momentum
Wave two (2008-2010)	• School Improvement Program • Ministry Improvement Program *subsequently combined to (Education improvement Program) EIP* • National Numeracy and Literacy Program	• Introduced but lost momentum • Introduced but lost momentum • Cancelled

Table 7-6 Main initiatives of the Bahraini reforms and progress

In addition, the PMO for the reforms delivered several strategic improvement plans for schools, higher education and the promotion of employability. It also provided support for the development of the national strategic plans, of the University of Bahrain, Bahrain Training Institute and early childhood education, in line with Vision 2030 (Forrest, 2016a).

In the next section, I analyse the enactment of the initiatives listed in Table 7-6 focusing on the K-12 reform initiatives. I begin by looking at the outcomes of the reforms as measured against the pre-defined *'metric-based'* performance indicators and the perceptions of those who were involved as to what happened, followed by an analysis of the reasons for these outcomes, reflecting the main categories of my analysis framework described in the methodology chapter.

Aims, Indicators and Outcomes

Bahrain's reforms were aimed at increasing the skill level of Bahrainis by developing education and training to strengthen their effectiveness in the labour market (EDB, 2006). This aim was reinforced in the country's vision document:

> we need to develop an education system that provides every citizen with educational opportunities appropriate to their individual needs, aspirations and abilities. Education and training needs to be relevant to the requirements of Bahrain and its economy, delivered to the highest possible quality standards, and accessible based on ability and merit. (EDB, 2008b, p. 21)

The first reform document outlines the goals in non-measurable terms; however, the subsequent reform report included 'Performance Indicators' developed for tracking the progress of the reform in Bahrain:

> By June 2013, all Bahraini students will be at or above grade levels in Mathematics, Science, Arabic and English based on international standards
>
> By June 2013, 75% of Bahraini schools will be rated at least 'good' by Bahrain's Quality Assurance Authority, compared to 24% currently. In addition, 100% of Bahraini schools will be rated at least 'satisfactory', compared to just 64% currently. This means that by June 2013, Bahrain should have no 'inadequate' schools. (EDB, 2008a, p. 5)

Similarly, these were reinforced in the vision document as a measure of success:

> Improvement of educational institutions in independent quality reviews and national examinations; scores in international tests of school performance (for instance, TIMSS, PISA and PIRLS). (EDB, 2008b, p. 22)

Whilst not making a clear judgement on the overall success of the actual reform projects, the SCET review report indicates that the reform process in Bahrain started well but soon slowed down and stalled (Forrest, 2016b, p. 4). The review analysed the performance across the entire education system by measuring student performance and the quality of institutions, relying primarily on the data of Bahrain Education and Training Quality Authority (BQA) and TIMSS results, supplemented by evidence provided by the MOE and the other relevant agencies.

At the outset of the SCET analysis, the 'highly contested' perceptions of the performance of students and the quality of institutions were highlighted. By comparing the data from all sources, it was clear that the BQA and TIMSS data correlated and demonstrated poor results, and in contrast, the MOE was reporting outstanding results (Forrest, 2016a, pp. 9-18). The report illustrates this by comparing the BQA's national examination results for grade 12 in subjects of Arabic and English with the MOE's *Tawjeehi* (grade 12) examination results for the same

subjects (see Table 7-7 below reproduced from the SCET report (Forrest, 2016a, p. 29))

	Passed MOE examination (%)	Passed BQA examination (%)
Arabic	99.5	41
English	98.6	12

Table 7-7 Comparison between MOE and BQA results

The report argues that the consequence of these 'competing' views left the decision-makers in the dark about the condition of schooling in Bahrain and about which direction it should pursue to ensure improvement (ibid, p. 17).

The SCET review of student performance indicates that the difference between expectations and results is immense and deteriorating and that students are not ready to meet the needs of Bahrain's future aspirations (ibid, p. 33). Similarly, up until 2013, there was evidence of improvement in a sufficient number of schools to put the whole system on an upwards trajectory; however, since then there has been a significant deterioration. The report attributes this deterioration to the poor quality of schools (ibid, pp 44-45).

This assessment of these outcomes is reflected in the perceptions of the participants I interviewed, who all pointed to a pattern of early successes which was followed by a loss of momentum that ultimately led to not achieving the pre-defined outcomes. The following extracts are illustrative:

> The reform met some of its goals; we were ambitious and achieved in some areas and not in others. The Polytechnic is a good institution, not the best in the world but it's a good institution to have in Bahrain – it was a good move and it can be even improved further. The BQA is actually a good organisation but unfortunately we have not used the output of its reviews to improve the education system … BTC I don't know to be honest, I cannot judge the BTC because it was always away from me. However, I don't think the BTC have achieved anything. Within the ministry I don't think big things have been achieved either. (Interview with policymaker 1, 15/01/2017)

> Yes [the reform was successful] to a certain degree but then we started to revert. (Interview with policymaker 2, 17/01/2017)

> The planning took place very well … but projects succeeded differently. (Interview with policy implementer 1, 09/01/2017)

Overall, both the SCET report and the stakeholders perceive that the reform was planned well and initially implemented successfully; measuring the initial success by the establishment of the different institutions, or the actual launch of the reform, i.e. against *'deliverable indicators'*. However, in the longer term they recognised that implementation challenges emerged, leading to failure in meeting the overall objectives of the reform.

Assessing the outcomes as they were defined in earlier years against performance today reveals that these outcomes were not achieved. In 2015, only 30 percent of schools were rated above 'good', whilst 27 percent were rated 'inadequate' (BQA, 2015). While in 2018, students continued to perform below the international benchmarks in Maths and Science (Mullis *et al.*, 2016). In addition to these data, the results of the local national examinations correlates with the TIMSS results and indicate the students are not performing well (Forrest, 2016a, p. 21).

Views and Explanations as to the Reasons for the Outcome

Both the review report and the interviews were used to explore views and explanations as to the reasons for the outcomes discussed in the previous sections. Whilst the report interweaved the explanations and reasons throughout the analysis and presented them as 'challenges' and 'lessons learned', interview participants were clear on calling them reasons for success/ failure, and sometimes presenting them as things that could have been done better. Eight 'categories' emerged from the analysis of the evaluation study and the interviews; the development of these categories was

explained in Chapter 5 and their definitions are included in Appendix 2.

Reasons for Initial Success

The initial success, as described by the different stakeholders, was attributed to four main factors: 'political support/ will', 'good planning', 'external expertise' and 'local leadership'. The report highlighted the point that significant political capital and planning was evident in the early success. Furthermore, the report argued that the external support extended to the MOE was beneficial:

> When the MOE was strongly supported by staff and consultants of the Education Reform Program as well as by the international partners involved in the development of new institutions and programs and was held regularly to account by the Education Reform Board (between 2007-2011), it showed that despite its size and poor reform record beforehand, it was capable and prepared to respond to the reform imperatives. (Forrest, 2016b, p. 77)

Similar views were shared in interviews with policymakers, policy implementers and consultants. The initial conceptualisation of the reform plan was applauded, describing it as 'a dream come true!' and the proposed initiatives as 'revolutionary ideas' (Interview with Policy Implementer 1, 09/01/2017). More importantly, the political will that created the necessary momentum and saw the reforms through to establish the different reform initiatives was viewed as an important factor in achieving stakeholder buy-in (Interview with Policy Implementer, 09/01/2017).

Both local stakeholders and the interview participants noted the success of the BQA, and whilst the SCET report does not explore reasons for this success, interview participants attributed it to the Bahraini CEO of the BQA and argued that this was critical to managing the consultants and internalising the borrowed policies:

> One of the reasons why the BQA was successful, was the presence of local teams since the beginning and there was a huge investment in them and transfer of knowledge, for every expat there were two shadowing Bahrainis … this was not the case with the BTC, which is clear in the reputation of the two institutions; the levels of success, international recognition and achievements are very different between the two. (Interview with policy implementer 1, 09/01/2017)

> The role played by the Bahraini leader appointed to the BQA, was seen as essential by the BQA team in managing the different international partners, managing the cultural clashes who were singing a different song. (Interview with policy implementer 2, 19/01/2017)

Reasons for Failure

Capacity of local team and institutions

The most repeated view on why the reforms were ultimately viewed as having failed revolved around local capacity; both in terms of people and institutions. The SCET report was clear in highlighting the MOE's inability to carry out the reforms and argued that it 'cannot manage education reform itself' (Forrest, 2016b, p. 77). The report also argued that:

> To make things change you need committed and talented people and leadership throughout the education system, not only the top. (Forrest, 2016b, p. 1717)

Interview participants attributed the difficulty in implementation to lack of local capacity:

> I wish we could borrow the quality of people from other countries. (Interview with Policymaker 1, 15/01/2017)

Which justified the reliance on quasi-government entities and international agencies:

> We [EDB] were established to be the catalyst of change … The education system, and the people working within it find themselves good and excellent, they only know what they know. However, when EDB changed its role and was not involved in education as it used to be, there was no champion of the project, and with no owner, and it got diluted… Nobody can shift the system unless they bring some body from abroad. Because the locals, even if they were to do something, they will only do what they know. (Interview with Policymaker 1, 15/01/2017)

Capacity building was also mentioned frequently as something that could have been done better:

> I think that we have not given enough time to create people who will lead the reform. (Interview with Policymaker 1, 15/01/2017)

And consultants were also clear about the failure in designing a clear deliverable around this aspect:

> What was probably neglected is that there should have been a succession plan for Bahrainis … deliverables around succession planning and if you fail your contract will finish. (Interview with Consultant 1, 17/07/2019)

Interestingly this presents an apparent contradiction, when reflecting on reasons for success above, local leadership was identified as essential for the success of the BQA. Thus, indicating that local capacity exists.

Governance: centralisation, lack of coordination and accountability

The review report recognises that one of the issues was 'the very high concentration of education facilities and functions within, or very close to one organisation, the Ministry of Education' (Forrest, 2016b, p. 66); giving the MOE 'a risk profile that militates strongly against successful education reforms' (ibid, p. 7). Furthermore, the report argues that there is 'no significance to strategy, purpose in decision making and good governance', which sacrificed longer-term improvements for short-term political expediency (ibid, p. 10). Illustrative examples in support of this point were given around how the MOE handled the Numeracy Strategy, which was developed based on international best practices to improve student numeracy performance. The report points out that this strategy was shelved, following 'modest' objections from students and teachers, on the grounds that it was 'too hard' (Forrest, 2016a, p. 94). The report argues that this illustrates the lack of evidence-based decision making.

Likewise, the report claims that 'working together in the national interest and accepting responsibility for results are just not a feature of Bahrain education' (Forrest, 2016b, pp. 13-14). The author argues that government entities were not behaving as a' collective enterprise': senior people preferred 'control' which was not

matched by a similar willingness to be held accountable for performance whilst exercising this 'control'. Interviewees, particularly the policy implementers, argued that coordination between different entities was essential but was not present:

> A critical element to the success is the collaboration and coordination. It needed careful consideration from day zero. You do not create institutions clashing in responsibilities without defining roles clearly. (Interview with policy implementer 1, 09/01/2017)

Policy implementers interpreted the clashes between the new institutions and the old as one of the main issues underlying implementation. Great emphasis was given to the lack of responsibility and accountability. A policymaker asked:

> Why were failures allowed? Where is the accountability? Do we know who is accountable? It is mind boggling, why people were not being held accountable for lack of delivery. (Interview with Policymaker 2, 17/01/2017)

Consultants argued that if they could change anything about the approach, they would have focused on establishing accountability measures:

> From day one, before entering into any education reforms, I would have liked to have seen who actually was the key driver and what governance and accountability mechanisms were needed in order to have this in place … The Deliverology approach, although there are problems with it, enables you to agree on core indicators and measure them over a period of time and have orderly stock takes to actually hold people accountable. (Interview with consultant 1, 17/07/2019)

Interestingly, the issue of creating parallel structures was not seen as a problem: in fact, policy makers and policy implementers argued that these eased implementation and managed politics on the ground:

> The Economic Development Board played a great role in terms of implementation, in terms of providing political support (Interview with Policy implementer 1, 09/01/2017)

Consultants argued that these parallel entities should have had more power over the MOE:

> The Education Reform Board never really had teeth … this was part of the problem, no downward accountability thus, no motivation for reform. (Interview with Consultant 1, 17/07/2019)

Speed of implementation

Policy implementers, particularly the team on the ground, felt that the carefully-planned reforms hit implementation difficulties because of the speed of implementation:

> However, after the implementation started, it seems that there was a rush. There was a chance for success, but what we lacked was a transition period between planning and implementation. This is characteristic of the approach not only in Bahrain, but the Gulf region. (Interview with policy implementer 1, 09/01/2017)

Reflecting on the BTC's establishment:

> There were a few of us, in the summer, and the college was due to start operations in September. We played administrator roles, leading roles, programme planning roles, course creator roles … we kept rushing, and did not take the pauses needed to reflect and build capacity. (Interview with policy implementer 1, 09/01/2017)

Communication

The report argues that one of the reasons for 'undoing' the reform was 'poor communications', claiming that not enough was done to communicate the purpose of the reforms and why they were needed (Forrest, 2016b, p. 2). The report suggested hiring a communications professional to support in reinstating the education reforms; developing communication plans directed at people involved in the education system (teachers and MOE employees), providers of private education; and stakeholders, especially parents and employers (ibid. p. 58). This view, however, was not mentioned by the participants interviewed, despite noting the resistance from teachers and parents to some reform initiatives, such as the numeracy strategy:

> Reasoning with parents is a problem … when we tried to implement the numeracy strategy, we failed because they objected and the MOE was not ready

> to understand the situation and fight for it. (Interview with Policymaker 2, 17/01/2017)

The failure was attributed to the MOE not fighting for the numeracy strategy, and not the lack of stakeholder involvement or communication.

Going forward

Similar to the other Gulf States, Bahrain has renewed its commitment to education reform by incorporating education initiatives and priorities in the government action plans (OFDPM, 2015; 2019). A dedicated education team at the First Deputy Prime Minister's Office (OFDPM), established in 2013, continues the role of implementing education reform initiatives in line with the country's vision and the government's action plan.

The dedicated education team also has a direct reporting line to the SCET, thereby replacing the Education PMO that carried a similar role from the EDB during the earlier phases of the educational reforms and continuing the parallel governance structure.

Furthermore, Bahrain continues to engage with the GEI for the design and delivery of future reform initiatives; a contract was signed recently with Roland Berger Middle East, an international consultancy firm, to restructure the MOE's organisational structure for efficiency and quality to enable it to deliver the reforms (Abdulnabi, 2019).

7.3 Discussion

The evidence suggests that the reforms introduced over the last two decades in all the Gulf States have not been successful in achieving their desired outcomes, particularly when measured against their own metrics. Stakeholders perceived that the reforms

were only successful in the initial phases. They argued that this was a result of the genuine intent backed by strong political will, good planning, external expertise, and in some cases of strong local leadership. However, once these reforms were handed over to the local teams, and gained traction on the ground, implementation issues led to challenges, which ultimately resulted in the goals of the reforms not being met. When describing their views and explanations as to what happened and what the reasons were, the local team effectively adopted the narrative and logic of the GEI, rationalising the failure by referring to elements within the local context, as described in Chapter 5; they wholly accepted and articulated the GEI's framing discussed in Chapter 4. The main reasons for failure identified, albeit in varying degrees between the different countries, were:

1. The lack of local capacity, both in terms of people and institutions. Participants argued that neither the government entities nor their teams were able to sustain the reforms once the experts left, reverting back to standard operating procedures. Moreover, they all felt that there was not enough attention given to capacity building and knowledge transfer.
2. The governance of the reforms, particularly the concentration of oversight for education into one centralised entity, lack of coordination between the different agencies and the lack of accountability were reported in the GEI's reviews and by the local stakeholders as reasons for the failure.
3. The initial political support appeared to play a major role in establishing the momentum that legitimised the reforms, key players who were initially sceptical of the government's intent gave in once they were convinced that these intentions were serious and backed up.

However, as soon as the priorities shifted and the political support decreased, both members of the GEI and the local team felt that this slowed the momentum and later led to a lack of accountability.

4. The policy implementers, particularly those who were on the ground, noted the speed of implementation as one of the factors contributing to the failure of the reforms. They argued that the reform concept and design were excellent, but that rushed implementation did not allow for a period of transition between planning and delivery.
5. Lack of communication was only noted as a factor by the members of the GEI, and addressed in their review reports. They claimed that the vision of the reforms' leaders did not filter down; causing confusion and sometimes resentment.
6. Although this was not evident in the perceptions of the Bahraini stakeholders, the tension between the GEI's recommended reform and the local context was noted in the other Gulf States.

The GEI used their assessment and evaluation reports to restate some of their initial recommendations or lay the ground for future reforms; a tactic discussed in Chapter 4 when analysing the modus operandi of the GEI. For example, in Bahrain's case, the SCET review report argued that the high school curriculum was not preparing Bahrainis for university; that regulation of the private sector was not done correctly; and that vocational education was a 'wicked' problem requiring more work. Similarly, the World Bank's review of the education systems in Kuwait and Oman included policy recommendations that directly influenced future reform plans.

Interestingly, none of policymakers, and to some extent the policy implementers, reflected on the approach itself, as they all agreed that the initial

success was attributable to the GEI and its expertise; problems only emerged when the delivery was handed over to the local teams. No one was critical of ‘borrowing’ international best practices, the wholesale economic framing of the reforms, nor of the reliance on external consultants. On the contrary, emulating features of top performing systems was accepted as a good practice in its own right, and when asked if they would have done anything differently, no one felt that this aspect was problematic or in need of review. Participants understood the limitations of borrowing, many of them pointed to ‘contextualisation’ issues and local politics being in tension with borrowed reforms. However, they argued that these would have been manageable issues had the capacity of the local teams been at the expected level. However, there was a general agreement that this approach, while not optimal, was still necessary. This is reflected in the continued reliance on the same approach when planning future reforms.

More importantly, in identifying what went wrong, or discussing implementation issues, both the GEI, through their reports, and the locals, avoided dealing with the underlying causes, for example, in identifying the lack of local capacity or the systems of governance. No one appeared to have analysed how issues embedded in the local context, such as the local capacity, had arisen as discussed in Chapter 5. The implication of this failure to address the underlying issues means that in diagnosing the problems of the education systems, only the symptoms are addressed, while their root causes are ignored. Thus, these countries are not investing in sustainable change, and the cycle of reliance on consultants is perpetuated, in the hope that the outcome will be different with every new reform initiative.

Chapter 8 **Discussion and Conclusion**

The main purpose of this study was to understand the approach to educational reforms in the Gulf States through an analysis of its contexts, features and outcomes. This final chapter is presented in three parts. In the first, I summarise the preceding chapters' findings. In the second, I present my argument and discuss the contributions of my study to the literature, especially around the conceptualisation of 'transfer' and 'context' and the role of the GEI. In the third and final section, I reflect on the significance of this study for the Gulf States and beyond.

The research was pursued over three connected levels of analysis corresponding to the three research questions, with an aim of analysing a distinctive approach to educational reforms that has emerged in the Gulf States during the first two decades of the 21st century. At the heart of this approach is a strategy that relies on emulating and borrowing 'global best practices' from top performing educational systems, selected and implemented by the GEI. As an insider, who spent more than a decade working alongside members of the GEI, designing the reforms and implementing them, I had a privileged starting point. As an academic researcher, I was able to capitalise on that experience and utilise the rigour of academic research to explore and reflect upon a topic that appears to be taken for granted in a region that is under-researched.

8.1 Summary of Chapters

The thesis opens with a review of the literature concerned with the two concepts that are central to my study: policy borrowing/ transfer and the GEI. In Chapter 2, I reviewed studies in comparative education and it was evident that despite the significant advancements made to the understanding of the concepts of borrowing

and transfer, the analytical models of the field were of limited value when applied to the practices observed in the Gulf. The model emerging in the Gulf is substantive and differs from the symbolic and selective forms identified in the West and the Far East or between rich and poor nations. More importantly, the Gulf's approach was characterised by the central and deeply embedded role of the GEI, which I argued was less understood, especially in its harnessing of policy borrowing as both a tool of policymaking and for promoting its commercial interest. Thus, I engaged with the political science literature, which appears to have developed a stronger analysis of the role of non-state actors in public policy and policy transfer. However, most of these studies were based on contexts that are different from the Gulf. It was clear that any understanding of the emerging approach to educational reforms in the Gulf, and the nature of policy borrowing embedded within it, required a better understanding of the role of non-state actors, their logic and modus operandi.

In Chapter 3, I elaborated on how this study emerged and consequently influenced the development of the main research questions. The topic, my professional background and the context of the study necessitated a qualitative approach reinforced through an interpretivist paradigm to provide an in-depth understanding of what was happening in the Gulf and why; this also serves to offset the dominant combination of positivist and normative perspectives advocated by members of the GEI.

Together, chapters 4 and 5 address the first research question: **What are the 'contexts' of educational policymaking in the Gulf States?** This served as the first step in understanding how the GEI operates in the region. Chapter 4 focuses on the economic context found in prevailing policy analyses of the GEI and from which educational policies emerge. Using the concepts of framing and policy narratives, I

distinguish between three levels of GEI publications and their depictions of context. The first level of analysis focused on the *generic regional reports* published by international organisations, such as the World Bank and the UNDP, in which depictions of local context include a wider array of factors, albeit with an emphasis on the economic. The second level focused on *regional self-funded policy analysis reports*, and at this level the conceptualisation of context narrows down significantly to focus solely on the economic utility of education. Depiction of the local context at this level primarily served the purposes of establishing the narrative of the policy problem, the construction of a crisis and describing the GEI's (deficient) expertise and the recommended solutions. The third level focuses on two types of *commissioned reports at the local level* designed for specific countries: the first reflects the initial proposals prepared by members of the GEI in response to requests from the Gulf governments to design educational reforms, and in which the construction of local context is highly selective and wholly economic. The second type are evaluation reports prepared by the same GEI members at the request of their clients to assess the implementation progress of the education reforms they were responsible for designing and implementing. The analysis of the latter type revealed that a wider range of contextual factors are identified and included to explain the failure of implementation. Overall, publications at the three levels appear to work in a complimentary manner: initially defining the metanarrative and collecting measurable indicators which are subsequently harnessed by commercial actors to support their business model. The analysis reveals how GEI actors used the local context as a framing device to select and narrow the ways in which the educational policy problem is defined and consequently addressed. This served two purposes; firstly, it reinforced the GEI's logic and legitimised their expertise and their proposed

course of action. Defining the educational reforms in wholly economic terms helps them diffuse ‘evidence-based policies’, or as the World Bank terms them ‘Science led service delivery’, that appropriate the use of global comparative data such as results of TIMSS and PISA and recommend global ‘best practices’ that have been proven to work elsewhere. Through this the GEI actors successfully constructed an urgent policy problem/ crisis that simultaneously marketed them as the sole owner of the expertise necessary to address it. Secondly, by downplaying other contextual factors in the initial design stage, they avoid having to engage with sensitive local issues and allow the blame for the later failure in implementation to be shifted to the local context. The GEI are thus absolved from being accountable and ensure their future business.

Chapter 5 departs from the selective framing of the GEI and broadens the analysis by revisiting the downplayed/ silent contextual factors, focusing on the commonalities that characterise the Gulf, including history, the political economy, labour market imbalances and sociocultural factors; and how these relate to the policymaking in the region. The factors I analysed in this chapter serve to explain two main aspects. First, why the Gulf States are receptive to the GEI and its approach. Second, how these factors explain the constraints of the GEI’s approach and the disappointing outcomes of the reforms. Together, Chapters 4 and 5 illustrate that there are multiple ‘contexts’ framing educational policymaking in the Gulf region and the recent educational reforms emerged from the active and highly selective framing of the GEI.

Chapter 6 addresses the second research question: **What were the critical features of the approach to educational reforms in the Gulf?** By comparing the reforms in all six Gulf States, I identified a contemporary and distinctive model of

educational reforms that emerged in the Gulf and continues despite its limited success. Whilst the reforms differed in their prioritisation of the policy problems and recommended solutions, there was a strong degree of commonality in the policymaking process. The main features were:

1. The reforms revolve around the need to improve the quality of the education system and invest in human capital to meet the economic aspirations of the Gulf States.
2. Global comparative data and performance on ILSAs are used as an accurate proxy of the quality of schooling and provide a metric for evaluating the reforms' success
3. The reform strategy uses an essentialised form of policy borrowing which involved the GEI selling international 'best practices' portrayed as transferrable sources of success
4. Members of the GEI, coordinated by a lead consulting company, sell advice, which promotes the wholesale 'borrowing' and implementation of educational 'best global practices'. They also provide a range of policy related functions (e.g. planning, policy delivery, monitoring and evaluation) normally undertaken by the state and,
5. The consequence of that was the emergence of a governance structure that locates the responsibility of education reforms outside the jurisdiction of the Education Ministries marginalising their roles and strengthening the role of the newly established semi-government agencies and the GEI.

Chapter 7 addresses the last research question in this study: **What were the outcomes of the reforms and how were they perceived by key stakeholders?** It reflects on the outcomes of the reform in two parts: the first offers an overview of the

reform outcomes in the Gulf States when measured against the predefined Key Performance Indicators of the reforms. I identified through my analysis two types of indicators: *'deliverable indicators'* and *'metric-based indicators'*. In the second part I analysed the case of Bahrain and went beyond focussing on the KPIs to explore the perceptions of the outcomes by the key stakeholders and the reasons that explain these outcomes. I illustrate in this chapter that the distinctive approach to educational reforms in the Gulf is of limited effectiveness when measured against its own metrics. Furthermore, this failure is explained by reference to features that are embedded in the local context, a view that is also used by local actors mirroring the GEI's approach identified in Chapter 4. I argue that the GEI and its approach are effectively distanced from the outcomes, thus its members continue to be contracted to reform the educational systems in the region.

8.2 Contributions, Limitations and the Future

The empirical findings summarised in the previous section are discussed in this section with relation to the literature and its limitations as highlighted in Chapter 2. This study identified a distinctive approach to education reforms of the K-12 systems in the Gulf, which relies on a 'commercial' form of policy borrowing advanced by the GEI. This contemporary and distinctive approach is not highlighted in the existing literature on models of policy borrowing. My analysis of this approach reveals that it emerges from the active but narrow economic framing of the local context by the GEI, who define the educational policy problem solely in economic terms. My analysis also highlights the limitations of this approach. I argue that by downplaying or silencing the wider local political and sociocultural contextual factors from the initial policy analysis, underlying issues are not addressed.

Furthermore, I argue that by using the local economic context as a framing device to explain and evaluate the impact of reforms, the GEI actors have constructed a sustainable business plan that effectively distanced them from the outcomes and located the failure within the local context. My analysis of the reforms' outcomes in the Gulf reveals that this approach to reform has not been effective, generates a form of dependency and creates unintended consequences that are in tension with the original goals of the reforms. In the following section, I elaborate on how my findings contribute to the CE and PS literature with a particular focus on the conceptualisations of the two interrelated topics of 'context' and 'transfer' and conclude with the contribution to the literature on the role of the GEI.

The analysis in this thesis has three implications for the conceptualisation and analytical models of policy borrowing/ transfer. Firstly the existing portrayals of policy borrowing as a symbolic, discursive and legitimatory exercise designed to harness support and create coalitions in contested political environments (Rappleye, 2012; Steiner-Khamsi, 2006; Schriewer and Martinez, 2004) do not apply to the Gulf. Public contestation over reforms or the legitimisation of existing political agendas is not a feature of policymaking in the Gulf's highly centralised political systems. The decisions to engage in policy borrowing are substantive and largely uncontested attempts to improve the quality of education and were initially well-received by the local media and the various stakeholders. The domestic 'socio-logic' in the Gulf seems to have involved the wholesale adoption of the logic of the GEI.

Secondly, the Gulf does not fit neatly into the continuum used to differentiate types of policy borrowing (Ochs and Phillips, 2004). Despite the apparent voluntary initiation and intent to reform by the state, non-state actors dominate the process just as in coercive policy transfer situations often associated with poorer nations

dependent on external aid (Auld, Rappleye and Morris, 2019). This confirms Dolowitz & Marsh's (2000) claim that the role of consultants in policy transfer complicates the categorisation between coercive and voluntary transfer.

Thirdly, the analysis reveals a distinctive approach to educational reforms that differs significantly from those described in a literature largely based on the analysis of policy borrowing between European nations and the USA; between East Asia and the West; and between rich and poor nations. In the Gulf, the GEI has effectively combined forms of comparison used for 'measuring' and 'prescribing' to the other' (Nóvoa, 2018; Nóvoa and Yariv-Mashal, 2003) to create a contemporary commercial form of comparative education which centres on 'selling to the other'. The problematisation of the contexts undertaken in this study confirms that 'context' is not a neutral set of facts (Sobe and Kowalczyk, 2013) and that multiple contexts exist and are utilised to mobilise policy (Piattoeva, Klutas and Souminen, 2019). The GEI has utilised the local context as a framing device. Framing has been identified as a key tool of advocacy used by politicians (Scheufele and Tewksbury, 2007; Weiss, 1989); however, the GEI has utilised the framing of the local context as a strategy that not only promotes its logic (Auld and Morris, 2014; 2016), but serves as both a marketing tool and contingency plan that sustains their business model and ensures repeat business. At the generic level, narratives that frame facts and numbers are critical in democratic contexts where policy proposals are contested and challenged. However, in the Gulf's centralised policymaking context, the political audience does not require persuasion; reforms were demanded, celebrated and encouraged. Thus, the implications for the framing literature in policy studies is that the Gulf illustrates how non-state actors harness the power of narratives to construct a selective contextual 'reality' to serve a commercial purpose. More importantly, this

demonstrates the GEI's approach in promoting and advocating transfer of international best practices.

With regard to the implications of this study for our understanding of how the GEI operates, at its core, as elsewhere, the GEI is selling educational products and services, portrayed as global 'best practices', for a profit in the Gulf. However, against this commonality there are a number of distinctive features to emphasise. The first and most apparent is the depth and breadth of the GEI's role in the Gulf. GEI actors were deeply embedded in areas traditionally viewed as 'statework' and engaged in all stages of the policymaking process from identifying the problems, advocating the options, implementing the solutions and evaluating them. They were effectively operating as the 'shadow education ministry' and this role was reinforced by their involvement in the newly established semi-government agencies that were created to circumvent the traditional bureaucratic mechanisms of the MOE and place education firmly in their remit. This role allowed the GEI, specifically the lead consultancy, not only to sell its services but also the power to influence what was subsequently purchased from whom.

Secondly, notwithstanding the extensive and interdependent networks and coalitions which characterise the operation of the GEI (Ball, 2007; 2012) and which were readily evident in the range of service providers employed in the Gulf States, the lead consultants' entry (and sometimes exit) into each of the Gulf nations was direct, ultimately dependent on its connections with, and the support from the Monarchy, normally the heir apparent (Saif, 2016). Thirdly, as noted above, the embeddedness of the GEI actors, and specifically their role as self-evaluators of the reforms, placed them in a powerful position to ensure reengagement and locate the sources of failure within the local 'context'; which excluded the GEI and its reforms.

More broadly, this research is concerned with a region that is relatively under-researched. The region, like others, has been subject to the country classification of international organisations which categorise countries depending on their level of development and income (Nielsen, 2011). The terminology has been widely accepted and often used in academic literature to distinguish between poor and rich nations. In this study, the categorisation raised a number of issues; the region's high-income classification is confused by its 'developing' status in other areas. I raise this issue for reflection: much of the existing research views the world through similar dichotomies, but clearly this is problematic. As the analysis and findings here demonstrate, the Gulf States combine conflicting elements; with its ample access to resources the region has gained significant power and influence on the global stage yet internally these countries remain under-developed in many areas. Scholars studying the region have attempted to develop dedicated classification systems for the Arab countries to circumvent the issues of the dominant classification systems (Kuncic, n.d.) However, and as this research demonstrates, country categorisation or classification is limiting and becomes an obstacle to our understanding.

Whilst I attempted to analyse the approach in all six states, much was ruled as 'out of scope' due to limits of time and space. An in-depth analysis at each state level and across the different educational sector levels (from early childhood to higher and adult education) could extend our understanding of how policy borrowing is becoming a product in itself, being sold by the GEI who claim to have mastered the art of comparing and identifying transferrable solutions. However as noted in Chapter 2 the role of the GEI is most embedded in policymaking at the state level in the compulsory schools sector which is the focus of this study. Further research is

needed to understand how, despite their inability to establish causalities and their continued failure to deliver the promised improvements, members of the GEI continue to be involved in reforms at national and global levels. Furthermore, while this study focused mainly on how the Gulf's education systems are being shaped by the GEI, it is also clear from the analysis in Chapter 5 that the state branding and upgrading strategies seen in the Gulf are in turn benefitting and shaping the GEI. Further research on this aspect is needed to enhance our understanding of this industry and the evolving educational markets.

This does not mean that this research and its findings cannot be used beyond the Gulf; on the contrary, the findings of this study apply to similar rentier states e.g. Brunei. More importantly, I argue that the Gulf provides a useful example that gives a preview into the future. The approach observed in the Gulf is now emerging elsewhere; for example, the promotion of privatisation and competition, the quest for a small state and the consequent reduction of the role and capacity of the civil service by privatising and outsourcing policy work is evident in England where the state has, in its belief in the efficiency of markets, decimated the capacity of the civil service and is increasingly reliant on the private sector in both the implementation of policy and policymaking.

Poorer nations do not have the resources to employ consultants on the scale evident in the Gulf; however, the advent of the Sustainable Development Goals (SDGs) has resulted in a shift away from a concern for educational access to a similar concern for 'measurable' quality. The OECD's PISA for development programme, created as a means for incorporating in the main PISA programme schools from lower and middle-income nations is an example of this shift. When this is achieved and league tables of educational performance are published it will be

possible to identify and promote best practices across most nations in the world regardless of their levels of development; the GEI will be provided with the essential tools of its trade. In parallel, the OECD's post-2015 paradigm for development claims to promote a new element, namely, the goal of 'establishing a broader and more substantive partnership among all nations and private entities' (OECD, 2013, p. 77). Whilst poorer nations may not be able to pay directly for the services of the GEI, however, the prospect that aid will be channelled into employing the GEI to assist poorer nations in measuring and improving their PISA for Development scores will become evident.

Closer attention and analysis of what is happening in the Gulf could illustrate the consequences of borrowing systems of educational policymaking which involve: the privatisation of the policy making process; an enhanced role for the GEI as the purveyor of 'best practice'; a reliance on standardised global tests of pupils to assess the quality of education systems; and the singular framing of schools as sources of human capital.

8.3 The Future of Educational Policymaking in the Gulf

Whilst this research was not intended to be an applied research project, it was largely influenced by a practical issue. Thus, in this final section, I reflect on the findings of this thesis in relation to the Gulf States. I do not intend to present this section as a list of recommendations, nor do I claim that these would provide practical solutions. Rather, in light of my findings, I hope to offer reflections and considerations for future policymaking in the Gulf.

This research has highlighted a number of critical limitations of the approach to policymaking in the region, especially the reliance on the GEI, specifically private

sector consultants, in educational policymaking. If the Gulf States continue to develop their relationship with the GEI using the approach identified in this thesis, they are at a risk of reinforcing their peripheral status (Donn & Al Manthri, 2010); they will ultimately 'purchase' and reinforce their dependency on the GEI and ensure unintended affects that are in tension with their future visions.

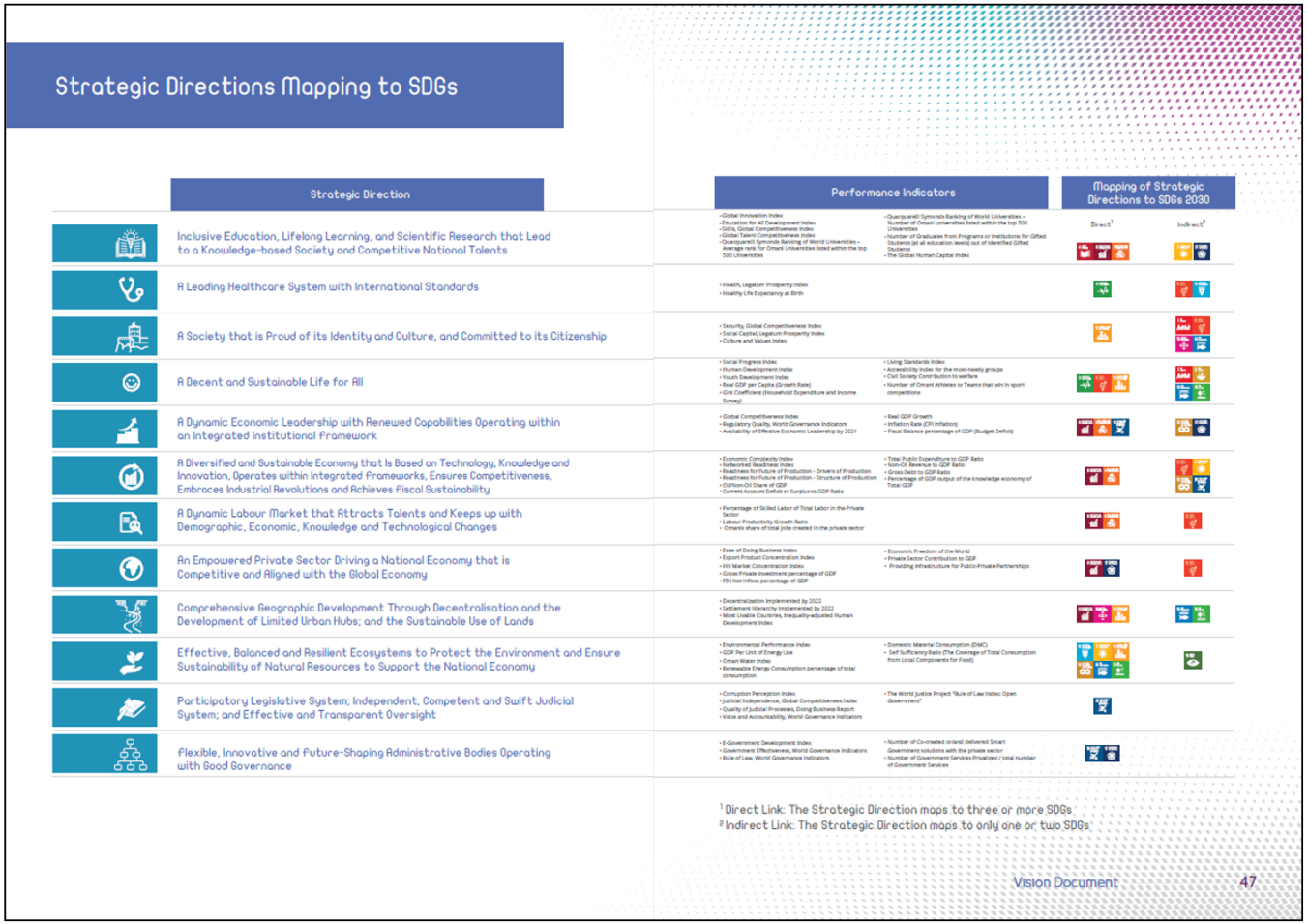
However this approach, despite these problems, appears to be strongly embedded within the thickening global governance regime, and particularly in the Gulf where there is a deficiency of local capacity. The recent global adoption of the 17 SDGs of the United Nations Agenda 2030 for Sustainable Development in 2015 by 193 countries may provide an opportunity to reduce that reliance. This requires:

> [o]ver the next fifteen years … countries to mobilise efforts to end all forms of poverty, fight inequalities and tackle climate change, while ensuring that no one is left behind (UN, 2019, para 2).

The SDGs build on the MDGs and:

> requires the partnership of governments, private sector, civil society and citizens alike to make sure we leave a better planet for future generations (UNDP, 2019b, para 6).

Consequently, the future wave of Gulf visions and national strategic goals will be closely aligned to the SDGs. This is already illustrated in Oman which is one of the first countries in the region to release a preliminary document of their future titled 'Vision 2040', and this clearly demonstrates the integration of the SDGs at the national planning level (SCP, 2019b) (see Figures 8-1 and 8-2 below).



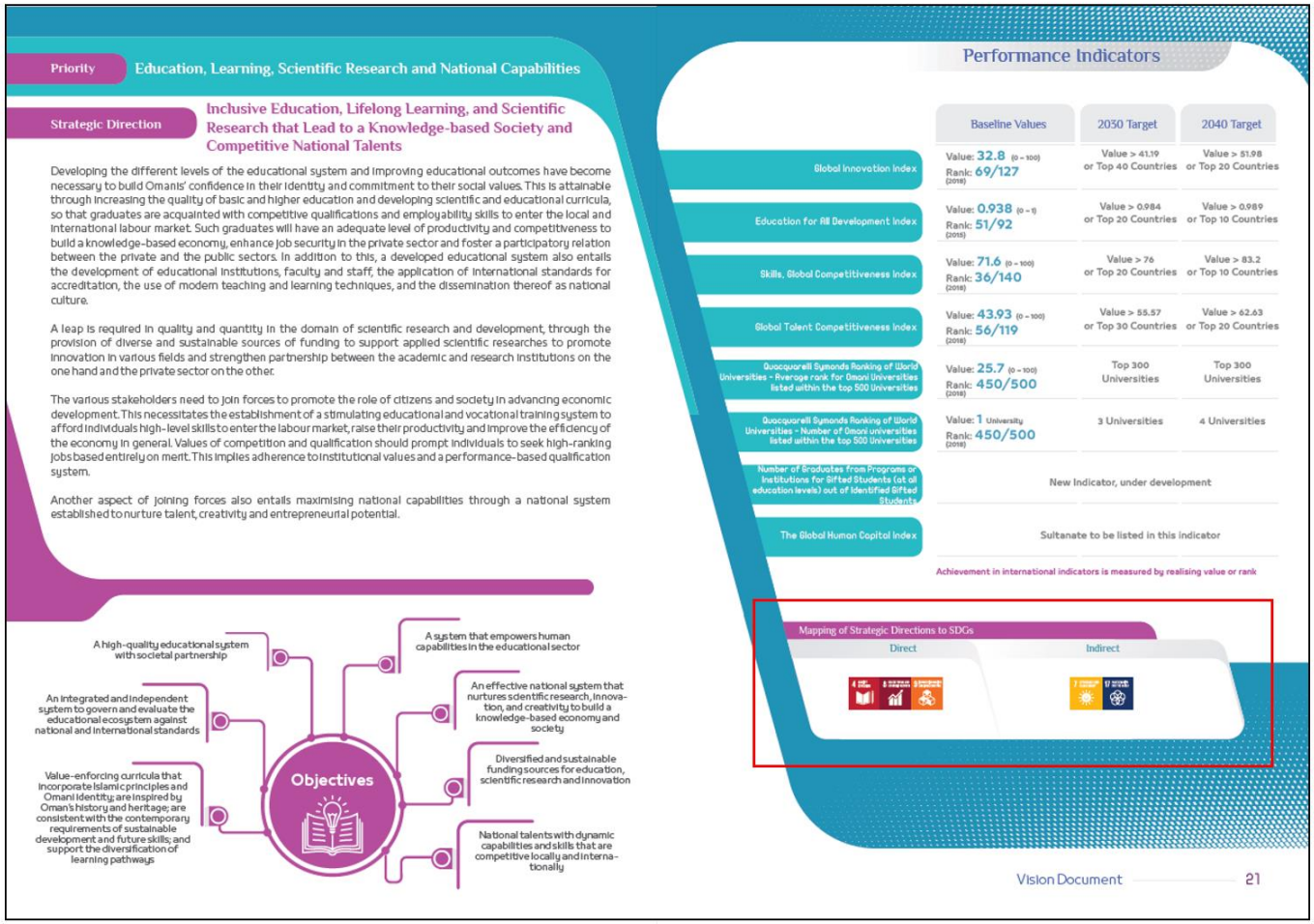
Strategic Directions Mapping to SDGs

Strategic Direction	Performance Indicators		Mapping of Strategic Directions to SDGs 2030	
			Direct[1]	Indirect[2]
Inclusive Education, Lifelong Learning, and Scientific Research that Lead to a Knowledge-based Society and Competitive National Talents	• Global Innovation Index • Education for All Development Index • Skills, Global Competitiveness Index • Global Talent Competitiveness Index • Quacquarelli Symonds Ranking of World Universities – Average rank for Omani Universities listed within the top 500 Universities	• Quacquarelli Symonds Ranking of World Universities – Number of Omani universities listed within the top 500 Universities • Number of Graduates from Programs or Institutions for Gifted Students (at all education levels) out of Identified Gifted Students • The Global Human Capital Index		
A Leading Healthcare System with International Standards	• Health, Legatum Prosperity Index • Healthy Life Expectancy at Birth			
A Society that is Proud of its Identity and Culture, and Committed to its Citizenship	• Security, Global Competitiveness Index • Social Capital, Legatum Prosperity Index • Culture and Values Index			
A Decent and Sustainable Life for All	• Social Progress Index • Human Development Index • Youth Development Index • Real GDP per Capita (Growth Rate) • Gini Coefficient (Household Expenditure and Income Survey)	• Living Standards Index • Accessibility Index for the most-needy groups • Civil Society Contribution to welfare • Number of Omani Athletes or Teams that win in sport competitions		
A Dynamic Economic Leadership with Renewed Capabilities Operating within an Integrated Institutional Framework	• Global Competitiveness Index • Regulatory Quality, World Governance Indicators • Availability of Effective Economic Leadership by 2021	• Real GDP Growth • Inflation Rate (CPI Inflation) • Fiscal Balance percentage of GDP (Budget Deficit)		
A Diversified and Sustainable Economy that Is Based on Technology, Knowledge and Innovation, Operates within Integrated Frameworks, Ensures Competitiveness, Embraces Industrial Revolutions and Achieves Fiscal Sustainability	• Economic Complexity Index • Networked Readiness Index • Readiness for Future of Production - Drivers of Production • Readiness for Future of Production - Structure of Production • Oil/Non-Oil Share of GDP • Current Account Deficit or Surplus to GDP Ratio	• Total Public Expenditure to GDP Ratio • Non-Oil Revenue to GDP Ratio • Gross Debt to GDP Ratio • Percentage of GDP output of the knowledge economy of Total GDP		
A Dynamic Labour Market that Attracts Talents and Keeps up with Demographic, Economic, Knowledge and Technological Changes	• Percentage of Skilled Labor of Total Labor in the Private Sector • Labour Productivity Growth Ratio • Omanis share of total jobs created in the private sector			
An Empowered Private Sector Driving a National Economy that is Competitive and Aligned with the Global Economy	• Ease of Doing Business Index • Export Product Concentration Index • HH Market Concentration Index • Gross Private Investment percentage of GDP • FDI Net Inflow percentage of GDP	• Economic Freedom of the World • Private Sector Contribution to GDP • Providing Infrastructure for Public-Private Partnerships		
Comprehensive Geographic Development Through Decentralisation and the Development of Limited Urban Hubs; and the Sustainable Use of Lands	• Decentralization Implemented by 2022 • Settlement Hierarchy Implemented by 2022 • Most Liveable Countries, Inequality-adjusted Human Development Index			
Effective, Balanced and Resilient Ecosystems to Protect the Environment and Ensure Sustainability of Natural Resources to Support the National Economy	• Environmental Performance Index • GDP Per Unit of Energy Use • Oman Water Index • Renewable Energy Consumption percentage of total consumption	• Domestic Material Consumption (DMC) • Self Sufficiency Ratio (The Coverage of Total Consumption from Local Components for Food)		
Participatory Legislative System; Independent, Competent and Swift Judicial System; and Effective and Transparent Oversight	• Corruption Perception Index • Judicial Independence, Global Competitiveness Index • Quality of Judicial Processes, Doing Business Report • Voice and Accountability, World Governance Indicators	• The World Justice Project "Rule of Law Index: Open Government"		
Flexible, Innovative and Future-Shaping Administrative Bodies Operating with Good Governance	• E-Government Development Index • Government Effectiveness, World Governance Indicators • Rule of Law, World Governance Indicators	• Number of Co-created or/and delivered Smart Government solutions with the private sector • Number of Government Services Privatized / total number of Government Services		

[1] Direct Link: The Strategic Direction maps to three or more SDGs
[2] Indirect Link: The Strategic Direction maps to only one or two SDGs

Vision Document 47

Figure 8-1 Mapping Oman Vision 2040 Strategic Directions to SDGs



Priority: Education, Learning, Scientific Research and National Capabilities

Strategic Direction: Inclusive Education, Lifelong Learning, and Scientific Research that Lead to a Knowledge-based Society and Competitive National Talents

Developing the different levels of the educational system and improving educational outcomes have become necessary to build Omanis' confidence in their identity and commitment to their social values. This is attainable through increasing the quality of basic and higher education and developing scientific and educational curricula, so that graduates are acquainted with competitive qualifications and employability skills to enter the local and international labour market. Such graduates will have an adequate level of productivity and competitiveness to build a knowledge-based economy, enhance job security in the private sector and foster a participatory relation between the private and the public sectors. In addition to this, a developed educational system also entails the development of educational institutions, faculty and staff, the application of international standards for accreditation, the use of modern teaching and learning techniques, and the dissemination thereof as national culture.

A leap is required in quality and quantity in the domain of scientific research and development, through the provision of diverse and sustainable sources of funding to support applied scientific researches to promote innovation in various fields and strengthen partnership between the academic and research institutions on the one hand and the private sector on the other.

The various stakeholders need to join forces to promote the role of citizens and society in advancing economic development. This necessitates the establishment of a stimulating educational and vocational training system to afford individuals high-level skills to enter the labour market, raise their productivity and improve the efficiency of the economy in general. Values of competition and qualification should prompt individuals to seek high-ranking jobs based entirely on merit. This implies adherence to institutional values and a performance-based qualification system.

Another aspect of joining forces also entails maximising national capabilities through a national system established to nurture talent, creativity and entrepreneurial potential.

Objectives

- A high-quality educational system with societal partnership
- An integrated and independent system to govern and evaluate the educational ecosystem against national and international standards
- Value-enforcing curricula that incorporate Islamic principles and Omani identity; are inspired by Oman's history and heritage; are consistent with the contemporary requirements of sustainable development and future skills; and support the diversification of learning pathways
- A system that empowers human capabilities in the educational sector
- An effective national system that nurtures scientific research, innovation, and creativity to build a knowledge-based economy and society
- Diversified and sustainable funding sources for education, scientific research and innovation
- National talents with dynamic capabilities and skills that are competitive locally and internationally

Performance Indicators

	Baseline Values	2030 Target	2040 Target
Global Innovation Index	Value: 32.8 (0 – 100) Rank: 69/127 (2018)	Value > 41.19 or Top 40 Countries	Value > 51.98 or Top 20 Countries
Education for All Development Index	Value: 0.938 (0 – 1) Rank: 51/92 (2015)	Value > 0.984 or Top 20 Countries	Value > 0.989 or Top 10 Countries
Skills, Global Competitiveness Index	Value: 71.6 (0 – 100) Rank: 36/140 (2018)	Value > 76 or Top 20 Countries	Value > 83.2 or Top 10 Countries
Global Talent Competitiveness Index	Value: 43.93 (0 – 100) Rank: 56/119 (2018)	Value > 55.57 or Top 30 Countries	Value > 62.63 or Top 20 Countries
Quacquarelli Symonds Ranking of World Universities - Average rank for Omani Universities listed within the top 500 Universities	Value: 25.7 (0 – 100) Rank: 450/500 (2018)	Top 300 Universities	Top 300 Universities
Quacquarelli Symonds Ranking of World Universities - Number of Omani universities listed within the top 500 Universities	Value: 1 University Rank: 450/500 (2018)	3 Universities	4 Universities
Number of Graduates from Programs or Institutions for Gifted Students (at all education levels) out of Identified Gifted Students	New Indicator, under development		
The Global Human Capital Index	Sultanate to be listed in this indicator		

Achievement in international indicators is measured by realising value or rank

Mapping of Strategic Directions to SDGs

Direct | Indirect

Vision Document 21

Figure 8-2 Oman Vision 2040 Strategic Direction for Education

Oman's preliminary vision document illustrates that the SDGs have provided the basis to envision a less dependent approach on non-state actors and promote local capacity building. For example, their strategic direction in education emphasises scientific research and development that promotes innovation and 'real' partnership between the academic and research institutions and the private sector and they also promote 'social partnerships'. (ibid, p. 21). Given that the other Gulf States have also adopted the SDGs, I suspect that the future visions and national strategic plans will also be closely aligned.

However, as I have shown, the GEI are deeply embedded and given considerable licence in the Gulf where policy work is concerned, particularly where there is deficiency in internal capacity and the expertise of consultants is seen to add value. There is therefore also the likelihood that the Gulf's reliance on the GEI's support will continue in the future, and that the current relationship between the state and GEI will continue. Gulf policymakers and educationalists may well try to capitalise on their adoption of the SDGs at two main levels: first, they may rely on the GEI and the private sector to draw up their plans to achieve the SDGs; second, they may use the SDGs to review their internal state-level policymaking frameworks, to justify further transformational reforms or to justify the reforms they wish to make. In these circumstances the Gulf's reliance on the GEI's support will not necessarily be reduced by their quest to achieve the SDGs.

Therefore, to ensure sustainable results, and based on the findings from this research, I argue that Gulf policymakers and educationalists could capitalise on their adoption of the SDGs as an opportunity at two main levels: first, to reflect on their

relationship with the GEI. Second, to review their internal state-level policymaking frameworks. I elaborate on these points below:

The evidence in this study demonstrated that consultants can deliver positive outcomes in the early stages of the reform, a view that is confirmed in other studies (Jones, 2018); however, in the longer term, their effectiveness decreases. And while the Gulf States have up until now been able to afford to engage in long-term contracts, this might not be the case in the future, and even if it were, it would not be a sustainable solution. As Gulf States seek to reduce the costs associated with government spending, consultants brought in to advise on how this should be done are often described as 'cashing in on austerity' (Peretti, 2016). However, and more importantly, consultants can create a form of dependency with a negative impact on capacity building. Therefore, the Gulf States need to manage the way in which consultants work, particularly with regard to the following two points:

First, consultants should not be given a near-monopoly over the policy process. As seen in the case of the reforms in the Gulf, lead consultants operated as part of a 'shadow' ministry, and often the same consultancy was involved in defining the policy problem, advising on strategies for reform, managing the implementation of the reform and evaluating its progress; over a lengthy period of time. Yet, their value was greatest when they operated in specific areas over a short period of time. For example, in the case of the reform in Bahrain, the impact of the consultants' involvement was noticeable in the early stages where most of the interview participants viewed this as a reason for the initial success of the reform. Furthermore, their expertise in project management, for example, was highlighted as an area in which they added value and helped where the capacity of the local organisations was

limited in this particular area. Thus, as effectiveness was only limited to the initial phases and in specific areas, their engagement should be short-term and targeted.

Second, where necessary, there should be a separation of roles, to ensure that checks and balances are in place. When a consultant is involved in the design and delivery, the same consultants should not be in charge of, for example, evaluating the implementation of reforms they designed and implemented. Further, the nature of the engagement and how its managed needs to be contingent on achieving the aims and KPIs the consultants claim they will deliver. An example of this is linking the deliverables of the consultancy contract around the progress measured against the attainment on TIMSS and PISA. At present, as I have shown, the GEI both evaluate their own work and are not remunerated based on their achievement of the KPIs they identify at the outset.

The SDGs provide a further opportunity to reduce the reliance on the GEI as all member states are expected, at least once, to review national progress towards the SDGs and present the report to the United Nations High Level Political Forum. This process is called a Voluntary National Review (VNR). The VNR could provide an opportunity to provide evidence which goes beyond the current reliance on narrow measures of pupil performance and which is designed to encourage greater local engagement in policymaking and partnerships that involve civil society and NGOs. As Unterhalter (2017) notes both the achievement of the SDGs and a decreased level of dependency will require that their evaluation does not rely on simple output measures such as PISA or TIMSS. The current reliance on such measures facilitates the role of the GEI as described in this study and results in a failure to focus on processes of both reform and learning. As Unterhalter elaborates there is a need to focus on capabilities (See for Example Sen, 1999 and Nussbaum, 2011) so that the

Gulf States do not end up valuing what is measured but rather measure what is valued. In the case of the Gulf States the relevant indicators which could reduce dependency in the long term could include measures of the penetration of the GEI and of the degree of local agency. If partnerships are to benefit the Gulf States and support its achievement of the SDGs then the Gulf States should consider moving beyond their reliance on the GEI and look to other sources of assistance and emphasise locally grown solutions that address long term capacity building and sustainable results.

Third, it is imperative to pay particular attention to the way in which transfer of knowledge is happening in interactions with the GEI. Clear succession planning and capacity building deliverables must be emphasised to ensure that consultants are held accountable against a specific well-defined capacity building strategy. The engagement with the consultants must be led by and working in collaboration with a local team, defined around clear and focused deliverables. Instead of the blank slate that is often given to the consultants, their role needs to support locally-conceived strategies as independent thinkers to challenge and evolve these strategies; consultants should not do the thinking for the policymakers. The Gulf States are in need of a locally defined purpose and aims of the education system; one that is not based solely on the GEI's economic framing, but involves local stakeholders, to consider the wider factors that are critical to educational policymaking. Relying on consultancy narratives often leads to a focus on symptoms rather than underlying causes. Consultants, as outsiders, will never have a full understanding of the local context, and will be inclined to tell their clients what they want to hear rather than what they might need to hear. By involving the local team in the policy problem definition stage, the wider local context will be considered allowing for the

alternative frames to emerge. Consultants avoid addressing the socio-political and cultural aspects because they feared these would jeopardise their objectivity and tenure. A local team would be in a better position to address and discuss these issues. Research shows that local solutions are more successful (Donn and Al Menthari, 2010) than those produced by external consultants. Consultants can then be asked to provide their expertise on designing the locally developed solutions and providing technical assistance during the implementation phase. The local team should always be the 'evaluator' of implementation to ensure the consultants are not distanced from the outcomes.

Fourth, studies show that 'there are different ways of gaining expertise other than developing an addiction to consulting' (Hill, 2018); numerous cases of states and corporations illustrate how consultants were not vital to success. For example, Wright and Kwon (2006) argue that South Korea relied temporarily on management consultants during 1997 economic crisis, but this reliance was short-lived and Korea internalised expertise and recovered economically since.

Finally, reforming education cannot be done in isolation; in the Gulf's highly centralised systems, reforming one sector will be dependent on the other sectors. For example, the centralisation of resource management in Ministries of Finance and Civil Service Bureaus often led to tensions with proposed reforms that ultimately resulted in reversal of many reform initiatives. Introducing the independent schools model in Qatar, where the Qatari government expected the schools to operate autonomously whilst being publicly funded, was challenged by the limitations of the overall context. For example: Qatari teachers were public civil servants, thus schools had limited autonomy on how to manage them within the boundaries of the civil service law. Similarly, expecting that reforming one aspect will create the necessary

impact to change its context is challenging and overly ambitious. For example, establishing the BTC as a ‘role model’ college within the University of Bahrain (UOB) and expecting it to lift the standards of the entire institution was not realistic, despite the heavy support the college received, both politically and financially. It was absorbed back into the UOB and lost many of its reformed characteristics such as the administrative autonomy. In the end, there are no short cuts in state-building; the Gulf States need to acknowledge that money cannot buy some important things.

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Appendix 1: Interview Protocol

General note: this schedule is designed as an interview guide; the questions are general with sub-questions probing for details. The questions can be altered based on the interviewee's role. For example: if the interviewee is from Bahrain or Qatar or if he/she is a policy maker/ implementer or a private sector consultant. The following is an interview guide template. The next section includes a selection of guiding questions that would work for specific groups.

Questions' heading rationale: the reforms in Bahrain and Qatar were introduced using a similar approach. Both reforms started with an analysis of the current education system (referred to as the 'diagnostic phase' in Bahrain and the 'analysis phase' in Qatar; both followed these phases with a strategy and recommendations phase, and implementation phase and review phase.) Therefore, the questions follow the same timeline to give the interviewees the opportunity to tell the story of the reform. This sequence is just a guide and it could be changed depending on how the conversation follows during the interview.

1.1 Preamble

- Thank participant and restate why this participant's views are valued
- Explain the research aims and objectives and why this interview is important
- Ensure anonymity, privacy and confidentiality procedures are explained
- Discuss consent (verbal or written) and permission to record
- Reaffirm that the participant can review the interview transcript, withdraw participation or certain statements and that the participant can be briefed on the research findings

1.2 General Questions

Introduction questions – general level

- What was your role during the education reform projects?
- Describe your perception of the reform process
- Why was the reform introduced? Were there previous reforms that you were involved in? Were they different? In what way?
- What are your views on the objectives and goals of the reform? Do you think these goals were achieved?

Diagnostic phase[29]

- Reflecting on the reform's first stage, the diagnostic:
    - How was it approached and who was involved in the process?
    - In your view, was the diagnostic successful in identifying the areas of strength and areas of improvements for the education system?

[29] 'Diagnostic phase' was the name of the first stage in the Education Reform in Bahrain; the name will be changed based on the country the interview is carried in. For example: in Qatar the name of the first stage was the Analysis Phase.

Reform strategy development phase

- After the diagnostic phase, how was the reform strategy developed?
- What was the strategy? i.e. what initiatives were to be implemented in response to the diagnostic results?
- Who was involved in the strategy phase? Who was in charge? What was the role of the consultants? (Try to probe for why the MoE was not in charge)

Consultants and International Partners[30]

- Did you work with any of the international partners/ consultants? Who were they and what was your role with them
- In your view, why do you think the international partners/ consultants were recruited?
- How were they selected?
- In your view, what was the role of the different consultants and international partners involved in the reform?
- What do you think are the advantages/ disadvantages of seeking the assistance of external advisors?
- How did the international partners/ consultants work with the local teams? Were there issues or concerns? If yes, how were they resolved?
- Do you see any difference in the implementation pace and quality after the departure of the consultants? Probe for explicit examples

Implementation and review phases

- In your view, in what way (ways) was the reform implemented?
- How were the reform initiatives that were decided during the strategy phase implemented?
- What was the role of international partners during the implementation phase? How did they work with the local teams
- Reflecting on the implementation, what were the main successes? What were the issues? What went well? What could have been done better? Were there any barriers to implement?
- Looking back at the reform from the first day until today, what are the lessons learnt and what could be improved?

Policy borrowing[31]

- Reflecting on the overall reform plan (and the specific initiative you were involved in if applicable), what were the international best practices promoted?
- How were the international best practices identified?

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[30] These questions are mainly designed for policy makers/ implementers. Section 1.3 includes questions aimed for the consultants as interviewees. Both countries sought the assistance of international private sector consultancies to review their education systems and recommend reform strategies.

[31] Both countries required learning from international best practices that encouraged intensive policy borrowing practices during the strategy design phase.

- What was done to contextualize these best practices? Can you reflect on the implementation in the local context?
- What were the benchmarks/ reference countries used?
- Which of these international best practices worked best in your opinion? What could have been done better?
- Were the prioritised initiatives sufficient to address the weaknesses and areas of improvement highlighted in the diagnostic phase results? Probe for why yes or no?

1.3 Specific questions guide (for consultants)

- Describe your role in the education reform projects as a consultant? Were you working on the policy making level or on a specific initiative?
- Reflecting on the reforms period, can you describe:
    - How were you identified to assist in the reforms?
    - Did you decide on policy recommendations or were you asked to implement specific deliverables that were already decided on?
    - In your view, what was good about this approach? What can be a good lesson to learn from in future attempts?
- Do you think the project you were involved in achieved its aims?
- How did you arrange the work with the local teams? What was done to ensure contextualization? Capacity building? Transfer of knowledge? Conflict management
- Where you involved with the other consultants working on other initiatives? How were these relationships managed
- Is there anything you would do differently outside the contractual deliverables? Policy recommendations you felt were missing?

Appendix 2: Definition of the main frame categories and subcategories

Definition of the categories and subcategories of the main coding frame		
Category	**Subcategory**	**Definition**
Constructing the context	**Policy problem**	This subcategory applies to the data that describes what the problems of the education system are, and why they require the attention of policymakers. For example, when in documents or interviewees the quality of the education is described as poor, and that this is a problem because poor education systems produce under-skilled labour force which will affect economic development.
	Supporting evidence	This subcategory applies to the data used as evidence to support claims about educational policy problems. For example, when the documents or interview participants argue that the quality of the education system is poor, what evidence is used to support this claim. An example is the use of TIMSS and PISA results or student results on national tests.
	Proposed solutions	This subcategory applies to the data where solutions to solve an educational problem is proposed/ recommended to improve or fix a certain situation. For example, in documents these would be the recommended reform policies.
Approach to reform	**Timing of reform**	This subcategory applies to the data that describes when the reforms were introduced and why. For example in interviews participants explaining when the reform was proposed and what motivated this decision at the time.
	Reasons for reforms	This subcategory applies to the data that describes and explains the reasons for introducing the reforms or certain reform initiatives. For example, in documents this would include any data that justifies the need for the reforms and in interviews this would include interviewees' explanation for why the reforms were initiated and what policy problem these were solving.
	What was reformed	This subcategory applies to the data, mainly in evaluation of progress reports and interviews that describes what was actually reformed. This differs from the previous category on proposed solutions as this details implemented reforms

	How were the reforms implemented		This subcategory applies to the data that describes the process used to design and implement the different reform. For example, was the reform introduced in stages, were there different working team and how the reform initiatives were selected and prioritised for implementation.
	Who was involved		This subcategory focuses on who was involved in the design and implementation of reforms, for examples, which local institutions were responsible, who sponsored the reforms and were there any international consultancies involved
Evidence as to what happened	**Outcomes**		This subcategory applies to the data that describes and evaluates the outcomes of the reforms that were implemented (if they were implemented or not). For example, these would include data about the performance against the pre-defined measures of success of performance indicators. Or whether the reform goals were achieved.
Perceptions around the reforms and outcomes	**Reasons for Success**	**Political support**	This subcategory describes one of the reasons for the reforms' success. Political support or political will is defined as the support the reforms received from the political leaders in the country. For example, if the reforms were introduced by the country's leader.
		Good planning	This subcategory describes one of the reasons for the reforms' success. It refers to the data that describes planning as good or well thought through. For example when interview participants reflect on the initial reform design period and describe it was well planned
		External expertise	This subcategory describes one of the reasons for the reforms' success. It applies to the data where references to the use of foreign/ external expertise was mentioned as a reason for the successful implementation of a certain reform and where international experts added value to the design and the success of a reform.
		Local leadership	This subcategory describes one of the reasons for the reforms' success. It applies to the data that refers to local leaders and their role in planning and implementing the reform. For example, when interview participants reflect on the role of a certain initiative leader and how this role had a positive impact on the outcome of the reform
	Reasons for failure	**Capacity of people and institutions**	This subcategory describes one of the reasons for the reforms' failure. It applies to the data that describes the local capacity of teams and institutions in designing or implementing reforms. For example, this would include the data from international organisation report that access the

			capacity of local government institutions or to the interview data that reflects on the performance of the local team and the ability of the local MOEs to change and reform.
		Governance	This subcategory describes one of the reasons for the reforms' failure. It applies to the data that describes the governance arrangement of the reforms, including the new entities established and their roles. This also applies to the views and explanations expressed across the data as to the impact of governance on the outcome of the reforms, including the role of the new institutions, the old institutions, and accountabilities.
		Shifting priorities	This subcategory describes one of the reasons for the reforms' failure. It applies to the data that describes the priority of the reform for the political leaders. For example when a participant argues that the level of support (which was a reason for success) decreased and how that effected the reform's progress negatively and why.
		Speed of implementation	This subcategory describes one of the reasons for the reforms' failure. It applies to the data that described the timeline of the reform. This applies to the documents and the interviews where the speed of implementation is viewed as a reason that affected the reform's success and outcomes.
		Communication	This subcategory describes one of the reasons for the reforms' failure. It applies to the data that reflects on the communication about the reform programs between the different stakeholder and how this affected the implementation, progress and outcome of the reforms.

Appendix 3: Interviewee Information Sheet

Institute of Education

UCL

Buying and selling education policies:
Educational reform in the Gulf

Information sheet for Interviewee's

I am inviting you to take part in my research project titled 'Buying and selling education policies: Educational reform in the Gulf'. This interview is part of my fieldwork to collect empirical data for my research towards a PhD Degree in Education from the UCL Institute of Education. I very much hope that you would like to take part in this research. This information sheet will try and answer any questions you might have about the study, but please don't hesitate to contact me if there is anything else you would like to know.

About me
I have been involved in Bahrain's national education reform project since it started in 2005. I held many positions across the board, from the policy development to policy implementation. I have seen how policies are developed at a national and departmental level and appreciate the complexity of implementation. Reflecting on my own experience and the progress of reforms in Bahrain motivated me to do this research. I am hoping that this study will reveal some insights about the approach to educational reforms the Gulf region that could inform future educational policymaking. Further details about the project can be given in the answers to the questions below.

About the UCL Institute of Education
UCL Institute of Education (IOE) is the world's leading Centre for education and related social science. Founded in 1902, it is today unique amongst faculties of education in its scale and in the depth and breadth of its expertise, unparalleled both in its impact nationally and in its work with education systems overseas. In the 2016 QS rankings, the Institute was placed first in the world for education for the third year running, ahead of Harvard, Stanford and Melbourne. For more information see www.ioe.ac.uk

Why am I doing this research?
I am conducting this research for my doctoral studies. My research analyses the approach to educational reforms in the Gulf with the aim to understand *how* and *why* educational reforms were introduced, designed and implemented. I observed during my involvement in Bahrain's reform that the approach in the region is distinctive. I argue that this approach relies heavily on a contemporary form of 'policy borrowing', a term used to describe the practice of emulating 'international practices' of 'top performing' education systems, which is different from the traditional forms identified and discussed in the existing literature. I also argue that this contemporary form is characterised by the dominant role of private sector consultants and education businesses, harnessing the data and the discourse of international organisations. This research will be addressed by two main research questions that involves two levels of analysis:

- What were the critical features of the approach to educational reforms in the Gulf over the last two decades?
- How did Bahrain reform its education system? What was the nature of educational policy borrowing and role of private sector consultancies in shaping the reform agenda?

Why am I being invited to take part?
Within your current capacity as [position title] in [organization name] and your previous experience throughout the education reform phases in [country], I believe that your experience, insights and answers will provide valuable input towards my inquiry.

What will happen if I choose to take part?
If you decide to take part, I will schedule a face-to-face interview. If a meeting in person is not possible, I will schedule a telephone or videoconference meeting. The date and time of the interview will be decided based on your availability. The interview should last for an hour, however, if we both feel that we need more time, we can schedule for subsequent dates.

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During the interview, I will share with you more information about the topic and objectives of my research study. I will be asking you questions about the reforms, your experience and perceptions. I will be recording the interview (by taking notes or using a recorder if you approve). I will share with you the interview transcript if you wish to review it.

Will anyone know I have been involved?
The data you share will not be attributed to you in person and all identities will be anonymised. I will be taking measures to ensure privacy and confidentiality takes precedent when analysing the data and publishing the findings.

Could there be problems for me if I take part?
There should be no problems with your participation in this study. If approvals from your organisation are required to grant you permission to be interviewed, I will write officially and obtain the necessary approval to approach you. If you decide to participate in this interview and later on wish to withdraw your statement, please know that you can do so by writing to me on [redacted] and the data collected from this interview will be deleted. I am also providing you with the option to review the interview transcript, should you wish to confirm your answers. You will also have the option to be informed and briefed on the published findings at the end of the research.

What will happen to the results of the research?
The data collected will form the findings sections of my PhD dissertation. Any information shared with me during the interview will only be used for this purpose and I will be keeping all records in a protected storage. I do not intend to keep a record for any further use beyond this research project and no one else will have access to the records.

Do I have to take part?
It is entirely up to you whether or not you choose to take part. I hope that if you do choose to be involved then you will find it a valuable experience and an excellent opportunity to share your experience and perceptions on the process of educational reforms

Thank you very much for taking the time to read this information sheet. If you would like to be involved, please complete the attached consent form and return to me as soon as possible, my contact details are provided below:

[redacted]

This project has been reviewed and approved by the UCL IOE Research Ethics Committee.

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Appendix 4: Consent Form Template

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Buying and selling education policies:
Educational reform in the Gulf

If you are happy to participate, please complete this consent form and return to the interviewer or email a signed copy to [redacted]

	Yes	No
I have read and understood the information sheet about the research	☐	☐
I agree to be interviewed	☐	☐
I understand that if any of my words are used in reports or presentations they will not be attributed to me	☐	☐
I understand that I can withdraw from the project at any time, and that if I choose to do this, any data I have contributed will not be used	☐	☐
I understand that I can contact Maryam Mustafa at any time	☐	☐

Name _____

Signed _____ Date _____

Researcher's name _____ Signed _____

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