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Comparative education as a political project

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ABSTRACT

This article argues that since World War II, comparative education has worked in the service of two historic blocs: one focused on creating institutions and ideologies in support of internationalism and a second focused on containing the threat of communism. Both versions have supported and justified foreign intervention into domestic education systems, mirroring colonial practices and logics. Once the United States of America became politically and economically hegemonic, the field helped develop mental models and best-practices of 'efficient' education systems, justifying international development efforts of Washington and the interests of capital. As the global political economy shifts so too will the political project of comparative education. The article posits future directions for the field on the assumption that a new economic bloc will emerge as East Asia plays a larger role in the global economy.

KEYWORDS



Comparative education; political economy; historic blocs; international development; world systems

Introduction

In 1990, W.D. Halls, known for playing 'a significant role in establishing comparative education' (Phillips 2011) in Britain in the 1960s and 1970s, posed an enticing question in a book he edited for the United Nations Educational, Scientific and Cultural Organization's (UNESCO) International Bureau of Education on contemporary issues and trends in the field:

No doubt the 'generation of the year 2000' will have very different concerns from those voices in this volume. What will they think of what has been done in the exciting 1960s, in the despondent 1970s and in the 1980s, the decade of renewal? (Halls 1990, 11)

As a self-proclaimed member of 'the generation of the year 2000' (I started studying comparative education in 2008), I find it valuable to revisit this question as we think of the field's futures from the vantage point of the 2020s. How indeed should comparativists today understand the 1960s, 'the date when some maintain that comparative education came of age' (Halls 1990, 11)? Are there legacies from our field's coming of age some sixty years ago that continue to impact us today? And are there possible futures that might break with these histories? The thesis advanced here is that dominant strands of

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comparative education scholarship have obfuscated and harnessed political understandings of education. This has occurred by utilising technocratic and economic thinking that ultimately supports the geopolitical interests of the United States of America (USA). As the world's political economy shifts, however, so too will comparative education.

The 1960s were a period of institutional and intellectual growth for comparative education. W.D. Halls called it 'a decade of optimism', filled with publications, travel, and observation. There were study trips to the Soviet Union and the UNESCO 'was beginning to send its educational missions all over the world. Comparative educationists, as they circled the globe, enjoyed goodwill everywhere' (Halls 1990, 12). Starting in 1955, UNESCO sponsored expert meetings in comparative education every eight years. The 1963 meeting 'focused on the identification and classification of contextual data in comparative education, an indication that the field was striving to become more systematic in approach' (Kobayashi 1973, 1). The meeting's Report, prepared by Holmes and Robinsohn (1963), contains a selected bibliography of over 160 citations directly related to comparative education, most of which were published between 1955 and 1963. A list of international organisations and centres, including the Comparative Education Center at the University of Chicago in the USA (established in 1958) and the Research Institute of Comparative Education and Culture at Kyushu University in Japan (established in 1953), showed the institutionalisation, geographic reach, and 'infrastructure' (Cowen 1990) of the nascent academic field. In the USA, informal gatherings organised by William W. Brickman were formalised into the Comparative Education Society, holding its first annual conference at New York University in 1954 (Silova and Brehm 2010, 21). Societies in other locations soon formed. It is no wonder W.D. Halls called the 1960s 'exciting' years for our field.

The field was also tied together by specific ideologies. Cowen (1990, 32) defined one common set of beliefs in the field as the 'commitment to the reduction of ethnocentrism' and a belief in internationalism. W.D. Halls (1990, 13), reflecting on Harold Noah's efforts to make comparative education a science, likened the field's international focus to medicine: 'after all, a science of medicine that was narrowly nationally conceived would be derisory; the same holds good for education'. Education, W.D. Halls suggested, ought not be 'nationally conceived'. Inserting the word international into the name of the Comparative Education Society in 1968 captured this commitment, although this is not to say there were no other reasons for and meanings attached to the term (Epstein 1992, 409; 2016, 57–73). Others called the field's ideological commitment meliorism as it worked towards 'the improvement of national educational systems by the addition of models, practices, innovations, and the like borrowed or transferred from other national education systems' (Wilson 1994, 453).

Sharing similar ideological convictions of internationalism and meliorism, the field was, therefore, easily integrated into the concerns of international organisations established post-World War II. The overlapping interests occurred mostly with departments of UNESCO but eventually with the World Bank and the Organization for Economic Co-operation and Development, among others. These organisations advocated more and better education for all peoples of the world. Education was believed to be one way to bring world peace because it could, with the help of comparative education, transcend nationalism.

Histories of the field written in the twenty-first century have been far more critical. Takayama, Sriprakash, and Connell (2017) edited a special issue of *Comparative Education Review* (founded in 1957) that explored the field's various colonial legacies. Whereas W.D.

Halls saw optimism, these editors saw erasure, marginalisation, and exploitation of peoples from the Global South. A special issue of *Comparative Education* (founded in 1964) edited by Manzon (2018, 2) ‘cast a critical eye on comparative education historiography’, directly challenging the collective memory of our field. Sriprakash, Tikly, and Walker (2020), extending the critique to issues of empire, showed the failure of international development – a ‘closely related’ field to comparative education – to engage with its own policy, practice, and research that (re)produced racial domination. The field, from these perspectives, reflects Eurocentrism, reproducing ‘racial hierarchies of empire’ (Sriprakash, Tikly, and Walker 2020, 678). Understanding who constructed the field and how opens the possibility for alternative and forgotten histories to emerge. Just as W.D. Halls surmised, future generations of comparative have had very different concerns than former generations.

The contribution I want to make in this article builds on these critical histories by detailing the ways in which comparative education as a political project has supported the political and economic structures of the USA in the twentieth century by producing mental models and best-practices of so-called ‘efficient’ education systems. This is reflected in the discourse of human capital, which emerged at the University of Chicago in the 1950s, and the practice of technical assistance, which intertwined universities, development agencies and academic consultancies. Human Capital and technical assistance have had important implications for the field of comparative education, which have not yet been fully explored. This forgotten history fills an absence in W.D. Halls’ ‘exciting times’ historiography. By recognising this history, future directions open for the field if – and when – it no longer works in service of the interests of the USA.

The article is structured in four sections. The first section outlines conceptual and theoretical terms that can help make sense of the field’s history since World War II, drawing on the work of Antonio Gramsci and Giovanni Arrighi. In the second section, it explores the political, economic, and ideological changes that occurred between World War II and the Cold War, and their implications for the field of comparative education. The third section explores technical assistance and human capital through the history of the Technical Assistance in Latin America (TALA) project. The final section looks towards the future, suggesting the decline of a world order centred on the USA and rise of East Asia offers important future directions for the field of comparative education. Comparative education will continue to be a political project. The question will be in what or whose interests will it serve.

Regimes of accumulation and historic blocs

Before advancing my argument, I need to briefly delineate a conceptual framework which informs my critique of comparative education as a political project. My starting point is to conceptualise political and economic structures as producing particular patterns of production and exchange. These patterns form a regime of accumulation, ‘a macroeconomically coherent phase of capitalist development’ (Tickell and Peck 1992, 192) which are supported by ‘institutions, networks, procedures, modes of calculation, and norms’ (Jessop 1990, 154).

Regimes of accumulation are not stable, however. They experience crises that subsequently trigger systemic transformations (Harvey 2017). As such, the spatial location

of institutions and networks that make up a specific regime of accumulation change and alter over time. Giovanni Arrighi (2010, 6–7) argues that the history of global capitalism can be understood through the study of ‘systemic cycles’ of regimes of accumulation across the globe, which have formed along certain geopolitical and geographical lines:

A Genoese cycle, from the fifteenth to the early seventeenth centuries; a Dutch cycle, from the late sixteenth century through most of the eighteenth century; a British cycle from the latter half of the eighteenth century through the early twentieth century; and a US cycle, which began in the late nineteenth century and has continued into the current phase of financial expansion.

Of interest for my argument here are the institutions, networks, and norms that emerged during the British and USA cycles. It will be argued that comparative education as a field has worked in support of the reigning regime of accumulation. However, since the field ‘came of age’ when the USA cycle overlapped with the British cycle, there exists ongoing tensions within the field between these two regimes of accumulation.

The institutions, networks, and norms within the British and USA regimes of accumulation suggests academic fields support the reigning political and economic structures of global capitalism. To help make sense of how this occurs, I turn to Antonio Gramsci’s notion of a historic bloc, which can be defined as the ‘historical congruence between material forces, institutions and ideologies ... organised around a set of hegemonic ideas that gave strategic direction and coherence to its constituent elements’ (Gill 2002, 58). Historic blocs are the ideational equivalent of regimes of accumulation; in fact, the stability of a regime of accumulation depends in part on historic blocs providing legitimacy to the political and economic structures that exist. That is, historic blocs produce mental models – the ideas and thinking that are assumed without question – in a particular moment in time. Like regimes of accumulation, historic blocs change over-time as new ideas take hold and justify new patterns of production and consumption.

Academics help construct and legitimate historic blocs because ‘intellectuals play a vital role in developing their specific social group’s or class’s economic, political, and social self-awareness and ideas about organising society, so as better to consolidate class positions’ (Parmar 2012, 10). They produce and legitimate a discursive formation that stabilises power in support of the regime of accumulation. Given that historic blocs change, it is possible to see new hegemonic formations emerge, which may cause academic fields to alter as well. If historic blocs change as regimes of accumulation move to new parts of the globe, then, following Arrighi (2014), one future will likely be concentrated on the new regime of accumulation that is in the process of becoming dominant in East Asia, namely within China.

Before this conceptual framework will be applied to the field of comparative education, it is important to recognise that there have been disagreements with the dominant discourses in the field on which this article focuses. There have been several debates over ideology and political partisanship (e.g. Carnoy et al. 1983) and resistant and critical voices have always found space in the field (e.g. Auld, Rappleye, and Morris 2019). Some scholars have even started to focus on elements of what I have labelled a political project within institutions of international development (e.g. Elfert 2021, 2023; Ydesen 2019) and the field itself (e.g. Carney, Rappleye, and Silova 2012; Steiner-Khamsi 2006). My goal is therefore to build on this work by arguing comparative education is a political

project working in support of the reigning historic bloc and regime of accumulation despite any internal resistance.

From revolutionary idealism to reformist realism

Comparative education as an academic field was institutionalised inside universities during the interregnum between World War II and the Cold War. In a matter of years, the emergent historic bloc shape-shifted in important ways. The 'revolutionary idealism' of internationalism, embodied in such institutions as the United Nations, were operationalised in a 'reformist realism', embodied by the Truman Doctrine (Arrighi 2010). Comparative education emerged in these years, producing a tension between a comparative education in support of some form of one-world, internationalism and an instrument for a particular version of (economic) development in support of, or benign to the hegemony of the USA.

Hegemony of the USA has its origins in the mid-1860s, the start of Arrighi's (2010) long twentieth century. Although not the most powerful state at that time, the USA eventually became a 'cohesive national economy' (Arrighi 2010, 300), the largest in the world. The economic and political rise of the USA was partly ushered in by the vertical integration of corporations (such as Standard Oil, Bethlehem Steel, and the like). This production strategy internalised transaction costs and therefore boosted profits, something businesses in other countries had not yet done. Soon, world capitalism and the various international institutions that emerged would be conceptualised as national markets and independent states where transnational corporations based in the USA could freely operate.

The 1860s was the height of the British regime of accumulation, which, by the end of a Great Depression in 1896, had shifted to high finance as its main source of accumulation. Like previous regimes of accumulation, high finance in twentieth century Britain marked the beginning of the end of its domination: it was only a matter of time before the British regime of accumulation would be usurped by another regime. That came in 1931, when Britain ended the tight link between the value of the pound and the value of gold – the so-called gold standard. The two World Wars finalised the ascent of the USA. With the largest military and national economy worldwide, the USA by the late 1940s was able to re-shape the structures and institutions governing the international system.

The transition from a British to a USA regime of accumulation was also marked by new questions over sovereignty. Although formal empires continued to exist well into the twentieth century, international structures were being created based on the idea of sovereign equality: no nation-state should meddle in the affairs of another; all countries, regardless of size or power, recognised the principle of non-interference. International organisations were also prohibited from intervening in the domestic affairs of member states. Article 2.7 of the Charter of the United Nations, for instance, states 'Nothing contained in the present charter shall authorise the United Nations to intervene in matters which are essentially within the domestic jurisdiction of any state'. The initial historic bloc under the USA regime of accumulation, embodied in the United Nations internationally (and Roosevelt's New Deal domestically), appealed 'to the universal desire for peace on the one side, and to the desire of poor nations for independence, progress, and eventual equality with the rich nations on the other' (Arrighi 2010, 68). Peace and prosperity could be achieved for all social classes by constructing welfare states across the world,

a global New Deal; economic growth and international cooperation through newly established institutions were the needed preconditions to achieve these goals. 'In fact', Truman said in 1947, 'the three – peace, freedom, and world trade – are inseparable'.¹

In many ways, sovereign equality was a fiction as much of the contemporary literature on (de)colonisation makes clear (McNamee 2023). The international structures of the post-World War II era, many of which had histories dating back to the 1860s (e.g. the Commission Financiere Internationale in 1869 in Tunisia and the Caisse de la Dette Publique in Egypt in 1874), served as 'legitimation machines, making older imperial practices acceptable for a new era' of USA hegemony (Martin 2022, 11). These new structures ensured influence without direct control, consent to USA (and British) interests without being formally colonised. This was achieved under the heading of global economic governance: international structures needed to ensure efficient capital accumulation across the globe, supposedly reducing inequality and conflict within and across nation-states. The most famous of these institutions before the United Nations was the League of Nations, which created structures for national interference under the guise of sovereign equality. The questions being debated at the time concerned the meaning of legitimate interference in another state's sovereignty:

Would a sovereign state allow an external body to control not only its budget and revenues, but also policies concerning the productive capacities of its citizenry and the management of its infrastructure? Could foreign investors agree to entrust capital to an international institution that did not become deeply involved in sensitive internal problems? And could the provision of technical advisers without powers of control be offered as an alternative? (Martin 2022, 136)

Long before the United Nations was established, answers to these questions were put to the test by the League. In post-war Greece in 1923, the League created a 'State within a State' (*imperium in imperio* – an expression harking back to the Dutch and British East India companies) to administer loans to tackle the humanitarian crisis caused by refugees returning from Turkey. In China in 1931, the nationalist government accepted 'advice without control' (Martin 2022, 168) whereby technical advisors from the USA and Britain guided the government in its own development projects: 'The most successful initiative of these experts was advising on the construction of thousands of miles of new roads. This was the first time that an international institution had ever attempted to provide technical assistance for a development project of this scope' (Martin 2022, 171). These experiences showed powerful countries at the centre of the regime of accumulation how they could interfere in the domestic politics and economies of other countries through international institutions that supposedly uphold a system of sovereign equality. Global governance depended, in part, on teams of technical advisors encouraging independent nations to enact policies that served the interests of the historic bloc.

In the post-World War II era, new international institutions were created that would 'wrestle with the long-standing problem of legitimation' (Martin 2022, 251). By 1952, the International Monetary Fund (IMF) used 'stand-by arrangements' to include policy conditionalities to its lending, a practice the World Bank would emulate with its Structural Adjustment Programmes in the 1980s (Reimers 1991). Jacques Polak, credited with advocating the conditionality approach in both the League and the IMF, recalled political decisions needed to be 'dressed up in economic garb' to make them palatable (quoted

in Martin 2022, 255). In other words, an effective way to interfere in a sovereign state was to articulate political goals in economic language, usually accompanied with econometric data and models. Such economic thinking began to dominate both domestic organisations in the USA and international organisations, a crucial transition of the historic bloc away from the revolutionary idealism of the immediate post World War II period. A key figure in the USA who embraced economic thinking was Secretary of Defense Robert McNamara (Berman 2022). He introduced the Planning-Programming-Budgeting System at the Department of Defense in the early 1960s. From 1968 to 1981, McNamara was the President of the World Bank where he oversaw the growth of the organisation by embracing data-driven, economic-type analyses to social problems around the world. Measurement became part of the 'regime of power and governance' used to advance the reformist realism historic bloc (Merry 2016).

Although economic thinking (i.e. striving for efficiency by using cost benefit analysis) might have been a façade for achieving certain political goals, the more interventionist historic bloc took hold because of the Red Scare (Storrs 2013). The turning point towards reformist realism was 1949. In September of that year, the Soviet Union tested an atomic bomb, ending the 'American monopoly on nuclear weapons' (Halberstam 1994). In October, the Chinese Communist Party triumphed over the Washington-backed Nationalist Party, surprising many of the so-called best and brightest in the foreign policy establishment of the USA (Halberstam 1972). By June 1950, Washington sent its military to the Korean peninsula to protect the demarcation between communist and non-communist controlled areas it had set up five years earlier. This created the conditions for President Truman to embrace George Kennan's policy of containment. The military of the USA and the myriad soft power institutions (re)created to support Washington were turned into so-called protectors of anti-communism. As a result of this shift,

the Bretton Woods organizations (the IMF and the World Bank) and the United Nations either became supplementary instruments wielded by the US government in the exercise of its world hegemonic functions or, if they could not be used in this way, were impeded in the exercise of their own institutional functions. (Arrighi 2010, 69)

The internationalism of Roosevelt and the United Nations was relegated to mere symbolic gestures. Soon the USA replaced the French in mainland Southeast Asia, ensuring hard and soft intervention would be used to stop communism, no matter the cost (or perhaps because of it). This became the unifying ideology of the new historic bloc in support of the interests of the USA.

Connections to comparative education

Why do these larger political and economic transitions in the regime of accumulation, tensions over sovereignty, and rise of reformist realism matter to comparative education? Because many of the ideas and debates in comparative education during its 'coming of age' reflect and were impacted by these emergent and shifting historic blocs. Comparative education, like other social sciences, was caught up in a 'cultural cold war' (Saunders 2000). Notwithstanding the tensions between the internationalist and the reformist realism blocs, thinkers identified as being seminal (by Fraser and Brickman 1968, 481–484), such as Isaac Kandel and Nicholas Hans among others, in the canon of comparative

education have argued in support of education's role in enabling social change (a form of meliorism), often in support of the historic bloc.

For example, Isaac Kandel (1881–1965), argued that education in new nations needed 'a complete change in the spirit of education and a departure from traditional canon and practices' based on assimilation and adaptation advocated by colonial offices (Kandel 1961, 131). Educational planning, he suggested, was needed to ensure 'primitive economies' based on agriculture of the newly independent nations would turn into 'modern economies'. The role for comparative education implied by Kandel was to investigate 'the past and present experiences of other countries' (134) to help in this endeavour.

Similarly, Nicholas Hans (1888–1969) wrote of modern systems of education as 'moulding' national character: 'the problems of education in different countries are similar and the principles which guide their solutions may be compared and even identified' (Hans 1949, 10). Modern school systems across the world from this perspective, experienced similar problems, which only comparativists could understand from careful study. 'Guiding solutions' from comparative insights is another way of saying advice without control. Although the focus was academic – an 'analytical study' Hans called it – the practical goal of comparative education from both Hans and Kandel's perspective was clear: educational change within the confines of the nation-state was desirable both domestically and internationally.

The extent and nature of comparative education in the production of social change has been contested within the field. Brian Holmes (1920–1993), for instance, recalls listening to the sociologist Karl Mannheim in 1945 at lectures at Kings College and seminars at the Institute of Education arguing for education and teachers 'to build a totally planned, free and democratic society' (Holmes 1981, 3). This was an extreme form of intervention, which echoed ideas circulating in the USA at the time. Although Holmes said Mannheim's ideas might appeal to many people at Teachers College, he was uneasy with total planning of a society. Instead, Holmes preferred Karl Popper's idea of an Open Society. Holmes said his embrace of Popper's idea was shared by Joseph Lauwerys (1902–1981), the professor of Comparative Education at the Institute of Education who played an influential role in the establishment of UNESCO. For Popper, Lauwerys and Holmes, 'piecemeal social engineering' was an acceptable alternative to total planning. He fondly recalled Lauwerys saying it was not the illiterate nations that waged war (cited in Holmes 1981, 30), showing his support of internationalism rather than reformist realism. Holmes (1981, 33) was more direct, calling technical advisers 'neo-colonialists'.

Other comparativists, especially those in the USA, supported a much more interventionist stance than Holmes or Lauwerys. Usually couched in positivist epistemologies, comparativists such as C. Arnold Anderson (1937–1990) at the University of Chicago and Harold J. Noah (1925–2019) at Teachers College used educational data to understand, for instance, the role of education in producing social mobility (Halsey, Floud, and Arnold Anderson 1961). Work in this vein supported ideas of educational opportunity as the basis for social justice rather than equality of station (Karabel 2005). Nevertheless, it was in the nascent work on educational planning (Parnes 1962) where the interventionist-strand of comparative education was most apparent:

The intrusion during the 1960s of economic models and economic rhetoric stimulated planning efforts throughout the world. Overwhelmed by the power and importance of education

and impressed with the perceived growth in the understanding of its complexities, analysts succumbed to their own wisdom and advocated formal, elaborate, uncompromising planning. (Adams 1977, 300)

Washington supported the early efforts in educational planning. The first director of the UNESCO International Institute for Educational Planning was Philip Coombs, the former director for education at the Ford Foundation and Assistant Secretary of State for Education and Culture under President Kennedy. Similarly, the National Defense Education Act (NDEA) of 1958 provided funding and attention to expand the study of comparative education, directly connecting the field to the anti-communist foreign policy goals of Washington (Steiner-Khamsi 2006).

The NDEA had important consequences for how the field was understood abroad. Chankseliani (2007, 277) argues the western academic discourse within comparative education that emerged after the NDEA perpetuated 'the hegemony and the normative status of Anglo-American and Western European Scholarship' across the Soviet Union. Her findings were based on a study of journal articles, a key part of the field's infrastructure. Brickman (1977) likewise pointed to a growing infrastructure that reproduced comparative education as a field, which was, I would add, typically in support of the historic bloc centred in the USA:

The activities of Unesco, the spread of the Fulbright exchanges, the increase of governmental programs of international assistance, the emergence of new nations, and other developments made many scholars and students conscious of the values of the study of, and research in comparative education. (Brickman 1977, 396)

The influence of the more-interventionist version of the historic bloc on the field of comparative education is most clearly visible in the history of technical assistance and theory of human capital.

Technical assistance and human capital

The role and import of technical assistance in support of the interventionist historic bloc that emerged post-World War II was institutionalised through President Harry Truman's Four Point Program of 1949. Whereas the Marshall Plan focused on rebuilding Europe, 'Point Four would be a self-help undertaking [around the world], with American assistance supplying the tools and "know-how"' (Paterson 1972-1973, 120). Truman said, 'in countries where the choice between communist totalitarianism and the free way of life is in balance, this program can tip the scales toward the way of freedom' (cited in Paterson 1972-1973). International assistance took on a clear aim: contain the threat of communism in support of the interests of the USA.

From 1949 onwards, the interests of the USA no longer resided in the one-worldism of Roosevelt and internationalism of the United Nations. Instead, the USA would be far more interventionist in hopes of promoting a liberal world order in support of its regime of accumulation. Although Washington used the United Nations to advance its own purposes whenever it could, it simultaneously moved forward with developing and supporting a wide network of public and private institutions, including universities, to advance its agenda. The flow of knowledge produced by this network 'reorient[ed] "mentalities" or

“mind sets”, particularly by shifting scholars’ reference points from their locale to a broader or global logic’ (Parmar 2012, 8).

One such institution that studied technical assistance was the National Planning Association (NPA). Officially established in 1934, the NPA was a nonpartisan think tank based in Washington. It produced policy papers in hopes of influencing law makers. In 1953, it created the Technical Assistance in Latin America (TALA) special policy committee. This committee was ‘composed of 26 U.S. and Latin American leaders from agriculture, business, labour, education, health and religious and professional groups’.² Professor Theodore W. Schultz (University of Chicago) was the head of research, in charge of producing the committee’s reports. In the first meeting in May 1953, Point Four was brought up on several occasions as was the threat of communism, clearly situating the work of TALA within the reigning historic bloc. Although members agreed the committee’s research cannot make direct change on the ground in Latin America, its work was nonetheless valuable because it provided ‘know-how’ in hopes of improving the standard of living for all. Economic thinking was found throughout TALA’s work. For instance, in the November 1953 meeting, one staff member argued the value of technical assistance using a cost–benefit logic: ‘more has probably been achieved per dollar for the U.S. through technical assistance than through military or foreign economic aid’.³

From the outset, the TALA policy committee understood the limitations of borrowing a best practice from one country and implementing it in another, mirroring early lessons of comparative education about the limitations of borrowing educational practices across cultures. At one committee meeting, Schultz put it like this: ‘It seems as if we have thought through a program for one country and find ourselves trying to impose it elsewhere. This bothers me’.⁴ The program in question was the *Servicio*, which was implemented in Mexico at the time and used to deliver health services in rural areas. The report prepared by TALA members on the *Servicio* found its strengths to include the ‘(1) ability of the Latin American government to retain a voice in policy determination; [and] (2) retention by the U.S. of a measure of control over the operation of projects’.⁵ Technical Assistance was clearly an act of balancing sovereignty with foreign meddling to obtain desired outcomes. Discussions over the *Servicio* moreover revealed some of the reasons for the success of the program had to do with ‘the human factor’⁶ – an early indication of Schultz’s later work on human capital. The committee would go on to support an ‘Exchange of persons program’ (like the Fulbright program) where ‘competent Americans [can go] to lecture in Latin American institutions and by way of bringing students, leaders and productivity teams to the United States’.⁷

Schultz used the TALA experience to advance his own scholarly work. He would go on to write a short publication entitled *Economic Test in Latin America* in 1956, which was based on his work with TALA. In this short bulletin, he reviewed issues around technical assistance and economic growth, couching his argument in Red Scare language common of the era. He eventually raised a question which would be the focus of much of his future work: ‘Where does economic growth come from?’:

If all or even most of it came from additional land, labor, and reproducible capital, our task would be clear enough and traditional economic analysis would apply. If, however, much or even most of the additional output underlying economic growth did not arise from additional inputs of the type listed, then our task becomes a wholly different one and

much more difficult because it would then be necessary to go beyond received theory in economics. (Schultz 1956, 17)

He goes on to make a few preliminary observations based on his work in Latin America, proposing that education be understood not as a personal expenditure, but as a form of investment. In his studies in poor countries across Latin America, he wrote, ‘many more people are finding it worthwhile to “invest” in themselves’ (25). These ideas would later be codified into his human capital theory five years later (Schultz 1963; 1971). His intellectual impact would be carried forward by his PhD student Gary Becker (1964), who popularised rates of return analyses, as well as post-doctoral fellow Jacob Mincer (1974) who codified the empirical study of human capital theory into what is now known as the Mincer equation. By the 1970s, the World Bank’s education lending was using human capital theory to justify loans and projects (Heyneman 2012). Human capital theory, in short, has been used (and abused) in education (Brown, Lauder, and Cheung 2020) ever since TALA and emerged during the early years of the USA regime of accumulation. It has been a central idea about education within the contemporary historic bloc.

Beyond human capital theory, TALA had an additional impact. Through TALA, Schultz developed connections to the Ford Foundation and the Organization of American States that would be essential in the establishment of the 1956 Chile Project between the University of Chicago and the Pontifical Catholic University of Chile (Valdes 2008). The Chile Project was an early university partnership like the type that TALA recommended and was used to spread anti-Communist ideas. This type of partnership was also found in Nepal (Rappleye 2019) and Iran (Hendershot 1975), among other places. The project was funded by the Ford and Carnegie Foundations – important institutions in the cultivation of the historic bloc – and educated the Chilean economists who President Pinochet (1973–1990) would eventually task with transitioning the country to a market economy. The Chilean student movement in the 2000s, which emerged in protest to these neoliberal reforms, and the 2021 election of Gabriel Boric as president are connected to this longer history of TALA.

Connections to comparative education

The connection between the ideas emerging from TALA and the field of comparative education took place through the Comparative Education Center at the University of Chicago. Started by C. Arnold Anderson in 1958, this Center became an important part of the field’s infrastructure. The linchpin between Schultz and Anderson was Mary Jean Bowman. Married to Anderson, she was a renowned economist who followed Schultz from Iowa State University to Chicago in the 1940s. Although not directly involved in TALA, she worked across the economic and education departments and regularly wrote about the economics of education in the Center’s annual reports. In the 1959–1960 report of the Center,⁸ the section entitled ‘Emphasis on the Economics of Education’ began by admitting that economics is a ‘somewhat unusual departure in a comparative education program’. Nevertheless, the report set out an argument as to why comparative education and the economics of education should be interconnected:

The role of education in economic development is just beginning to receive attention, and little is known as to the part of education must or can play in various aspects of development.

Neither has the economics of international trade in human capital received the systematic attention called for by the growth in programs of technical assistance. The pay-off from these kinds of research will be high.⁹

The section ended by saying it was 'encouraging that economists have recently been added to the staffs in comparative education at the Institute of Education in London and the research centre in Frankfurt'.¹⁰ Clearly, the economics of education were building close connections to comparative education, far closer than Hansen (1977) suggested.

The networks of comparative education and the economics of education were intertwined by the 1960s, at the formative stage of the field's development in universities. These networks have extended to the present day. Bowman, for instance, taught Stephen Heyneman (among other figures in the field of comparative education), who would later work for the World Bank and help introduce rate of return analysis in the 1970s as a way of abandoning what was then perceived to be the more socialist-oriented approach of manpower planning (Heyneman 2003). Rates of return – and the Mincer equation – continue to be used in educational lending by the World Bank.

In terms of the historic bloc and political project of comparative education, these actors and institutions were part of the 'academic hubs radiating intellectual influence' (Parmar 2012, 7) of ways of thinking about forms and models of education and development. In this way, a large part of comparative education became 'interested in propaganda and the dissemination of different types of political ideas abroad' (Fraser and Brickman 1968, 1). The interest in total planning or piecemeal social engineering beyond one's borders, in many respects, continues to exist as a prevailing form of comparative education in support of reformist realism. What would happen, however, if the regime of accumulation and historic bloc began to change?

Towards a new political project?

Historic blocs are dynamic and do not last time immemorial. Arrighi (2010; 2014) shows how regimes of accumulation are connected to historic blocs. They cycle across long centuries, are composed of political and economic structures, and are geographically centred in different parts of the world at different times. As a world system, they connect states together, usually in unequal ways. The USA regime of accumulation of the long twentieth century fully emerged some eighty years after its economy became the largest worldwide in the 1860s. It took the British debasing the pound and two World Wars to cement its position, but even then, competing historic blocs existed: one focused on creating the institutions and ideologies in support of internationalism and a second focused on containing the threat of communism as a form of reformist realism. Although the latter became prominent – and certain institutions and academic discourses emerged in support of it – the former continued to exist and can still be found today. The 'coming of age' of comparative education, as I have tried to argue, has straddled these two historic blocs.

When thinking of the field's future, it is important to note that changes in the regime of accumulation are not historically determined. The same can be said of historic blocs. It was neither a given that the USA regime of accumulation would usurp the British regime nor a certainty that a belief in internationalism would succumb to reformist

realism. It took multiple crises over a protracted period and diverse coalitions finding common cause. Nevertheless, it is possible to identify changes to the world system that could subsequently impact the political project of comparative education.

The first noteworthy change is that regimes of accumulation have, at least historically, been marked by a period of decline when high finance becomes the main source of capital accumulation. Although financial capitalism produces new sources of wealth and power for the hegemon for a short period of time (what Arrighi calls *belles époques*), they nevertheless fail to reverse the declining rate of profit over the long term that mature capitalist economies eventually experience. During this decline, new centres of localised or regional capital accumulation begin to emerge. Competition erodes the historic bloc supporting the centre. It is possible that hegemony may be lost. No longer are the interests of the elite in the periphery aligned with the elite in the core.

In today's regime of accumulation centred in the USA, high finance was embraced starting in the 1970s (Harvey 2017, 174–175). This period singled a change in the regime of accumulation, particularly the rise of interest-bearing capital and the new formations of social relations, including in education (Brehm 2019; Eaton 2022). From a world systems perspective, the USA regime of accumulation is currently in its *belle époque*. New locations have emerged outside of the USA where capital can be accumulated and challenges to the historic bloc have been crystallised in many parts of the world in the aftermaths of the failed War on Terror in Iraq (2003–2011) and Afghanistan (2001–2021) as well as the global financial crisis of 2008. In this way, the power of Washington has become based on 'dominance without hegemony' (Guha 1997 cited in Arrighi 2014).

The focus in comparative education research on the *belle époque* of the USA regime of accumulation will be an important area in the future. Scholars should document the ways in which the current regime of accumulation and historic bloc come to an end or are reconfigured to persist and the impacts this has on education systems worldwide. One possibility is the rise of rentierism where bond holders gain immense power within the economic system (Harvey 2022). This is already an emerging strand of research in comparative education, notably along the lines of assetisation (Komljenovic 2021). Similarly, comparative education should focus on the ways in which dominance without hegemony works within systems of education. This would focus on the financialisation of education, including the influence of social impact bonds on public policy (Broom 2021) and the use of de-risking in international development (e.g. the International Finance Facility for Education; Gabor 2021).

Another notable change concerns the interstate system. The buyers of much contemporary high-finance debt came from East Asia, Japan at first and then China. This suggests that there is a good chance that the long twenty-first century regime of accumulation could shift from the USA to East Asia at some point (Arrighi 2014). Without the ability to predict the future, it is impossible to say if such a shift in accumulation will ultimately happen. If it does, it will most likely centre on China. This suggests that one future of comparative education must focus on China. Much more work, therefore, needs to explore the ways in which a Chinese historic bloc – comparative education as a political project with Chinese interests – is taking shape. What institutions will advance the Chinese political project of comparative education? What ideas will become predominant? How might

education systems support or hinder the emergence of a Chinese historic bloc vis-à-vis the USA historic bloc? And how is international interference justified and legitimated?

One area of comparative education that deserves special attention in the future is educational planning. Comparative education within the USA historic bloc used ideas (of the economics of education) and institutions to enable technical assistance as a legitimate form of intervention within sovereign states to promote certain ideas of so-called proper education. Educational planning, from this perspective, was possible in any nation-state with the right 'know-how'. Educational planning and technical assistance assume a particular form of sovereignty that is far different from the notion of sovereign equality. In many ways, educational planning and technical assistance allow for the continuation of empire without armies, colonisation through manufactured consent. Although there were and are debates over the extent to which intervention within sovereign states was – and is – possible or desirable, some form typically existed in the canon of comparative education. What might a Chinese political project of comparative education say about sovereignty? What will technical assistance and educational planning look like through Chinese-dominated institutions? Answers to these questions are already emerging (Vickers and Morris 2022; Wright, Lin, and Lu 2022), but more work is needed.

I end by recognising, like W.D. Halls did over thirty years ago, that the generation of the year 2050 will have far different concerns about comparative education than I have developed in this article. Hopefully by then a new historic bloc will have broken free from the stranglehold of the reformist realism that has, for better or worse, shaped the 'coming of age' of our field. Only then, in hindsight, will future comparativists be able to understand our field's direction of travel.

Notes

1. Address on Foreign Economic Policy, delivered at Baylor University, 6 March 1947, 167, Public Papers, Harry S. Truman Library. <https://www.trumanlibrary.gov/library/public-papers/52/address-foreign-economic-policy-delivered-baylor-university>
2. National Planning Association press release, 1956, box 1, Theodore W. Schultz, 1902–1988 Papers, University of Chicago Archive, Chicago, IL. <https://catalog.lib.uchicago.edu/vufind/Record/6003583>
3. Minutes of the November 21–22, 1953, TALA Policy Committee Meeting, page 6, box 1, Theodore W. Schultz, 1902–1988 Papers, University of Chicago Archive, Chicago, IL. <https://catalog.lib.uchicago.edu/vufind/Record/6003583>
4. Minutes of the May 2–3, 1953, TALA Policy Committee Meeting, page 16, box 1, Theodore W. Schultz, 1902–1988 Papers, University of Chicago Archive, Chicago, IL. <https://catalog.lib.uchicago.edu/vufind/Record/6003583>
5. Minutes of the November 21–22, 1953, TALA Policy Committee Meeting, page 2.
6. Minutes of the November 21–22, 1953, TALA Policy Committee Meeting, page 4.
7. Minutes of the May 1954 TALA Policy Committee Meeting, page 5, box 1, Theodore W. Schultz, 1902–1988 Papers, University of Chicago Archive. Chicago, IL. <https://catalog.lib.uchicago.edu/vufind/Record/6003583>
8. Comparative Education Center Records, Box 1, Folder 1, page 19, University of Chicago Archives, Chicago, IL. <https://catalog.lib.uchicago.edu/vufind/Record/7932027>
9. Comparative Education Center Records, page 20.
10. Comparative Education Center Records, page 20.

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