

SWG “The History of Educational Funding: Models, Debates and Policies in an International Perspective (1800-2000)”

Annual report 2019

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General information

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Purpose of the SWG

Educational funding is vital for our understanding of mass schooling. As Brian Simon once noted, finance is “the life blood of any system that requires effective resources for healthy functioning¹” An increasing number of researchers – both in history of education and in economic history – have consequently addressed various aspects of the economic and financial dimension of primary, secondary and tertiary education². Economic historians have

1 Brian Simon’s preface to Norman Morris, *The Politics of English Elementary School Finance 1833–1870*, Lewiston: Edwin Mellen, 2003, p. iii.

2 Marcelo Caruso, « Why Do Finance? A Comment About Entanglements and Research in the History of Education », *Nordic Journal of Educational History*, vol. 2, n° 1, 2015, p. 141–149.

investigated how variations and changes in educational expenditure have been linked to, for example, factors such as wealth inequality, political voice and fiscal capacity, social historians have explored systems of local funding, and historians and educationalist have also explored finance from a policy-perspective.

Despite the immense contributions of these studies, there nevertheless remains a wide range of unanswered questions. Much work has focused on a specific level of funding (local, national, international) or a specific level of schooling (primary, secondary, higher education). There is still much to be learned by emphasizing the interdependence of different levels of funding, especially during transitional stages – e.g. from decentralized to centralized systems – and the transfer of funding models from one level to the other – e.g. from primary to secondary education. Moreover, contemporary issues like school vouchers, student loans and more generally the funding of university – studied by sociologists and economists – would be more clearly apprehended if situated in a broad historical perspective. Finally, the relation between funding models and the content of educational policies needs to be further analyzed.

The purpose of this standing working group is to stimulate the growing research in the history of educational finance by bringing researchers of different disciplines and nationalities together. Thus, our standing working group will foster a dialogue between quantitative and qualitative approaches, and promote international comparative perspectives on education funding. One of our goals is to go beyond the comparison among limited territories of similar countries (“developing countries”, European and North American countries, BRICS etc.) to build a global comprehension of these phenomenon. On the one hand, we will try to use the comparative approach as a tool to better identify and analyze common trends; on the other hand, we will be attentive to the transnational circulation of different funding models, as well as to local receptions and appropriations according to specific political, economic or pedagogic settings.

Past and current activities (2018-2020)

Workshops and meetings

- ERASMUS+ exchange (visit by Clémence Cardon-Quint to Örebro University, 1 week, april 2018)
- August 28th, 2018, Berlin : pre-conference workshop, 21 attendees
- July 16-20th, 2019, Porto : 3 parallel sessions during the ISCHE conference.
- EHSSC, March 18-21th, 2020, Leyden (Cancelled) : 1 session organized by Johannes Westberg and Gabriele Capelli “The Rise of Education across World Regions: Qualitative and Quantitative Evidence”

Methods of group communication

- We have set up a discussion list, first intended for the members, but open to all : h_fundingeducation@groupe.renater.fr
This discussion list has currently 57 subscribers.

Publication project

We are preparing a joint issue of the *Nordic Journal of Educational History* and of *Histoire de l'éducation* on the topic " *School finance reforms: genesis, purposes, and effects. France and Sweden (19th-21st centuries)*". The CFP is open until May 1st.
A workshop will take place in autumn in Bordeaux (France).

Call for papers for ISCHE 42

CFP for ISCHE 42

The proposals for ISCHE 42 in Örebro may address one of the three topics specified below, or simply the open section "New perspectives in the history of education funding".

1. "Political economy", "political economy of education": challenging readings for the historians of education funding

Historians and sociologists of education have a long tradition of studying social inequalities in education. They have analyzed the institutional transformations that have extended access to education (compulsory schooling, raising of the school leaving age) as well as the social implications and social factors of curriculum changes. However, the financial and fiscal implications of these transformations have been rarely at the heart of historical inquiries.

These questions are directly addressed by political economists, and political economists of education. In this literature, the repartition between public and private sources of funding, as well as the level of public funding for various parts of the school system (vocational educational training, higher education etc.), or the repartition of education resources between different social groups are analyzed as one dimension of the various redistributive policies led by the governments. In other words, these financial aspects depend on but also inform a more global regime of inequalities and redistribution.

In this session, we welcome papers that would propose a critical reading of one, or of a selection of articles, chapters or books in "political economy" or "political economy of education", that address the issue of school funding with a historical perspective. The accent may be put on methodological and epistemological issues; readings may critic or challenge these analyses, or alternatively identify which hypotheses or results could lead to new inquiries in the archives.

Suggested readings (the following list is not exhaustive):

ANSELL Ben W., *From the Ballot to the Blackboard: The Redistributive Political Economy of Education*, Cambridge, Cambridge University Press (coll. « Cambridge Studies in Comparative Politics »), 2010.

BUSEMEYER Marius R., *Skills and Inequality: Partisan Politics and the Political Economy of Education Reforms in Western Welfare States*, Cambridge, Cambridge University Press, 2014.

GARRITZMANN Julian L., *The Political Economy of Higher Education Finance: The Politics of Tuition Fees and Subsidies in OECD Countries, 1945–2015*, Palgrave MacMillan, 2016, 332 p.

GOLDIN Claudia Dale et KATZ Lawrence F., *The race between education and technology*, Cambridge (Mass.), 2008, vi+488 p.

IVERSEN Torben et STEPHENS John D., « Partisan Politics, the Welfare State, and Three Worlds of Human Capital Formation », *Comparative Political Studies*, 4 mai 2008, vol. 41, 4/5, p. 600-637.

PIKETTY Thomas, *Capital et idéologie*, Paris, France, Éditions du Seuil, 2019, 1197 p. (The English version will be published in March 2020)

2. Money from abroad? International/transnational/foreign resources for school funding

In an era of international organizations and businesses, world political issues, and increasingly global communications, historical research has placed greater emphasis on the study of cross-national actors, ideas and policies in the field of education. Approaches used to examine such phenomena have multiplied to include connected and entangled history, but also perspectives inspired by world, global, and transnational history.

Drawing on this historiographical renewal, this session welcomes papers that in various ways address how national governments, international organizations (such as UNESCO, World Bank, UNICEF, OECD), non-governmental organizations and local actors dealt with school finance issues in the Global South. Special attention will be paid to financial problems posed by development policies in African, Asian and Latin American countries during the 20th century, both from the perspective of Western agencies (financial aid programs, loans, etc.) and recipient actors (in relation to their educational expansion plans). Papers examining local experiences within this field and/or transnational processes of borrowing and lending of ideas and models of investment are particularly welcome. Proposals to focus on more contemporary forms and strategies of educational funding, such as micro-credit projects and institutions, will also be taken into serious consideration.

3. School finance between state and local school districts

The relationship between central governments and local governing bodies remain fundamental to the historiography of education. We welcome papers addressing this theme from the perspective of school finance. Papers may deal with the political debate on the funding of national educational systems (primary, secondary, tertiary level), the design of state subsidies and their impact, and so forth.

4. New perspectives in the history of educational funding (open section)

Submission process

Proposals should be a maximum of 500 words excluding bibliography. The deadline for submission of papers to any SWG is January 31, 2020.

Please note that all proposals must be submitted through the conference electronic system by selecting the respective SWG in the Abstracts area.

Authors will be informed by April 1, 2020