

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

Annual report 2021-2022

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### General information

#### Convenors of the SWG:

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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 functioning<sup>1</sup>” 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 education<sup>2</sup>. 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 (2018-2022)

### Workshops and meetings

- ERASMUS+ exchange (visit by Clémence Cardon-Quint to Örebro University, 1 week, april 2018)
- August 28th, 2018, ISCHE 40 - Berlin : pre-conference workshop, 21 attendees
- July 16-20th, 2019, ISCHE 41 - 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”
- January, 2021 : three webinars (18, 22, 27 January) on the topic “School finance reforms, France-Sweden”

- June, 2021, ISCHE 42 – Örebro (virtual) : 2 parallel sessions during the ISCHE conference
- September, 2022, ISCHE 43 – Milano : 2 parallel sessions during the ISCHE conference.

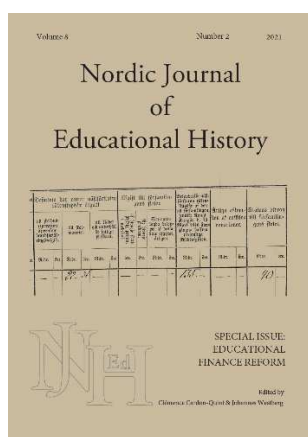
## Methods of group communication

- We have set up a discussion list, first intended for the members, but open to all : [h\\_fundingeducation@groupe.renater.fr](mailto:h_fundingeducation@groupe.renater.fr)  
This discussion list has currently 57 subscribers.

## Publication

Clémence Cardon-Quint and Johannes Westberg have published 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)":

- *Nordic Journal of Educational History*, vol. 8, number 2 (2021), "Special issue: school finance reform"  
- <https://journals.ub.umu.se/index.php/njedh/issue/view/30>



- *Histoire de l'éducation*, n°157 (2022), "Les réformes du financement de l'éducation"  
- <https://doi.org/10.4000/histoire-education.7144>



## Call for papers for ISCHE 44

### CFP for ISCHE 44

The proposals for ISCHE 44 in Budapest may address one of the three topics specified below, or simply the open section “New perspectives in the history of education funding”.

#### 1. The intricicated politics of educational finance

For those who study education budgets (at local and national levels, and even in international organizations), the focus is usually on the confrontation between stated educational objectives and the resources allocated to achieve these objectives.

However, for the political actors who decide on spending and resources, the decision to increase spending on education can have a wide range of objectives, from tackling unemployment by keeping young people in school, to boosting industry by building new schools. This intertwining of policy objectives can be an opportunity for education policy-makers as it increases the level of resources available for educational objectives, but it is also a source of constraints.

Studies that address education within this broader political economy framework are still rare. In this section, we invite researchers to consider situations where education spending is clearly the tool of a political agenda that uses the financial flows induced by the education sector for a variety of reasons, beyond the educational objectives *stricto sensu*.

This section is open to empirical studies, and to methodological considerations on the sources or on the interpretative challenges raised by these issues.

## **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 20<sup>th</sup> 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 remains 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 + bibliography. The deadline for submission of papers to any SWG is January 31, 2023.

**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, 2023.**